



Marketing Manual

For

Document Imaging

A Service Bureau Solution

Featuring

Digitech Software



and

iChamber™

2009 Edition

Document Imaging Marketing and Pricing Guide

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1. What are we selling?

We are selling what we have always sold in the “Offsite Records Management” industry, Information Management and Storage.

While I don’t think for a minute that any of us believe that the “paperless office” will become a reality in any of our lifetimes, we must take steps to secure our share of the marketplace and continue to grow our businesses bottom line.

Document Imaging and the management of Electronic Records provide us an opportunity to offer new products and services. This is something that does not happen very much in our exciting world of killing trees and loving the smell of cardboard in the morning.

However, this new service does come with a price.

Here are a few of the items on the list:

- ✓ Software
- ✓ Hardware
- ✓ Knowledgebase
- ✓ Support
- ✓ Upgrades
- ✓ Connectivity

What we are proposing is to offer you a wide variety of implementation solutions that allow you to do everything from “Test the Water”, to “Sink or Swim”. The beauty is that we have the relationships with vendors that allow us to introduce you to the market at a fraction of what it would cost you to go it alone.

At some point in the future you may decide you do not need us or any of the benefits we feel we offer. That is why we are offering a clear and simple “Service Agreement” that does not lock you in to anything for an extended period of time.

Any of our solutions will allow you to be more than competitive in your marketplace for several reasons:

- ❖ The software is one of, if not the best software packages in the industry – price competitive and packed with flexibility and features that are incredible
- ❖ We have “been there and done that” so we can work with you to shorten the learning curve in both the production environment and the sales and marketing environment.
- ❖ Our buying power will allow us to provide you with tested scanners and workstations **loaded and ready to go**, at or below what you would pay for the hardware alone.

What are we selling (Con't)

- ❖ Most markets are still in their infancy, with the few service providers that do exist attempting to gouge the buyer. A wonderful playing field to be in, if you don't get greedy.
- ❖ You have the best potential client list already paying you money and entrusting you with their information. (Scan on demand is a wonderful lead in to the larger and more current projects).

That should be enough to, at least peak your interest and get you to continue to the "Product Overview" section.

A. Product Overview

PaperFlow – (Capture Software) - The most powerful, complete and full featured document capture and indexing system on the market.

PaperFlow is the predominant electronic office assistant for high volume image capture. PaperFlow offers increased functionality and multi-market appeal by addressing the scalability requirements of both the service bureau and end user environments.

Features: Scan, Display, Index, OCR, Barcode, Match & Merge, Automation Manager, Import capabilities. Optional OCR/Export or Barcode/Export configurations available.

PaperFlow can be configured in one of the following ways:

1. OCR/Barcode (standard configuration)
2. OCR/Export (option 1 requiring export)
3. Barcode/Export (option 2 requiring export)

Note: This is the capture software that would be resold to those clients that desired to do their own initial image capture.

PaperFlow Pro – (Capture Software) – Is intended for full-featured Scanning that requires exporting to retrieval systems in addition to PaperVision Enterprise that comes as an add-on module with PaperFlow.

Note: This is the capture software that is intended for the service bureau environment. It gives you additional output flexibility that would allow you to capture, index and then export images to a client's already existing retrieval system.

PaperFlow Lite – (Capture Software) - Comes with the same install as PaperFlow. It is basically a scaled down version of PaperFlow. It allows for the following basic capture functions: (Scan, Display, Index, Match & Merge, Automation Manager, Import, Export Conversions)

This product does not support any barcode or OCR indexing needs.

Note: This capture software is intended for the most basic of capture jobs and while it is a powerful tool, it does not offer the scalability offered in the other capture products.

A. Product Overview (con't)

PaperVision Enterprise – (Retrieval Software) – PaperVision Enterprise brings instant access and control to mountains of paper and endless scattered versions of corporate electronic documents.

This powerful retrieval software is intended for management of documents from a central database consisting of multiple projects for one entity: licenses for separate entities must be purchased separately. Includes both desktop and web-based access licenses, Administration Console, API's and source code (for web and desktop clients)

Concurrent user license for document management.

Features: Some of the major features include:

- ✓ 200 Document Types
- ✓ Up to 200 index fields
- ✓ Full text search engine
- ✓ Fully HIPAA compliant
- ✓ 21CFR level security and auditing

Note: This software is only necessary if they choose to store the images on their own internal hardware. You may choose to charge a monthly support or access fee to supplement the monthly electronic storage fees generated through the utilization of “*iChamber™*” (our storage network here at DataChambers).

PaperVision Enterprise Directory Manager (DM) – (Import and File Management Tool) –Directory Manager is an automated service, which performs imports of miscellaneous files from any media into the PaperVision Enterprise document repository. Imported files are automatically indexed based on directory names, file names, delimited segments of file names and file modification date. Allows for imports from ad-hoc document management systems and third-party capture applications, and also tightly integrates with many fax server systems and network attached scanner/copiers. Additionally, Directory Manager supports third-party provided full text data for images from an associated full text file.

Licensed separately (per entity) as an add-on module to PaperVision Enterprise or is included with the PaperVision Enterprise Advanced Administration Pack.

Product Overview (con't)

Note: This software works in conjunction with PaperVision Enterprise and offers powerful automated document management features when managing electronic documents from multiple platforms.

PaperVision Enterprise Advanced Administration Pack (Data Replication and Administrative Tool) - The Advanced Administration module for PaperVision Enterprise includes browser based administration, data replication capabilities, and the PaperVision Enterprise Directory Manager. This component also provides COM and Web services API's for administrative functionality.

State-of-the-art data replication capabilities enhance your backup capabilities, security and redundancy.

Licensed on a per entity basis.

Note: This software is intended for the serious internal scanning client, where security and document transaction auditing is critical and for application developers for integration into existing or new software products.

OCRFlow - (Capture for full text search through the use of Optical Character Recognition) - Works in conjunction with PaperFlow and PaperVision Enterprise to provide text-based search capabilities. OCRFlow provides a full-page module designed to perform complex OCR functionality in a very easy to use "4 screen process", with integrated quality control and "on-the-fly" corrections, while maintaining the layout and format of the original.

Licensed on a per seat basis.

Note: This software is powerful and has incredible potential applications. It does however require more front-end labor and quality control effort during the capture process.

QCFlow – (Capture Quality Assurance Tool) - Works in conjunction with PaperFlow to ensure that captured data has been scanned and indexed properly. QCFlow provides many intuitive, manual and automated tools to deliver the data accurately. Performs high volume quality assurance through the use of thumbnails. Allows for manual or automatic processes such as page/document reordering, density checks, blank page detection/removal and marks images for rescanning.

Licensed on a per seat basis.

Product Overview (con't)

Note: This software will have more applications for larger clients who choose to do the capture themselves. PaperFlow Pro contains numerous quality assurance tools that could make this software unnecessary for your capture operation.

PaperVision® Distribution Assistant - This module is an optional component of both PaperVision Xpress and PaperVision Enterprise for document retrieval. Benefits include a simple embedded licensing process authorizing appropriate usage on each piece of distributed media (i.e. CD or DVD). PVDA offers a “point and click” viewing capability on almost any host computer, eliminating the traditional process of first installing the viewing software. Service companies will appreciate the simplicity of embedding this updated viewer into deliverable media of their choice.

This module is strongly recommended for professional and portable presentation of images not housed via iChamber.
Licensed on a per entity basis

PaperVision® Xpress - (Basic Document Retrieval)

PaperVision Xpress is designed for departmental users looking for the competitive advantage of a document imaging and retrieval system. Documents and electronic files are integrated into one library and can be retrieved across a corporate network, regardless of the storage mechanism. Comprehensive search capabilities guarantee fast results. A user-friendly interface minimizes training while assuring successful implementation and increased productivity. Once your document is located, PaperVision Xpress allows you to easily print, email, fax, annotate or export the data.

This module would be sold in your end users and is locally installed on their work station. The purchase and resale of Xpress could eliminate the need for PVDA. Concurrent user license for basic document retrieval.

B. Business Models

There are 5 different opportunities that can be marketed:

1. Service Bureau Solution – You do it all

- ✓ Pick-up the documents and/or retrieve them from your Records Center
- ✓ Prep the documents for scanning
- ✓ Scan the documents
- ✓ Index the documents
- ✓ Deliver the documents – via CD and/or *iChamber™*

2. Enterprise Solution – You set them up to do it all internally

- ✓ Sell/Recommend the hardware
- ✓ Assist in hardware installation
- ✓ Sell the software – Capture, Retrieval and any necessary add-on modules.
- ✓ Assist with install and support software (1st line)
- ✓ Front-end process training
- ✓ Software training
- ✓ Execute an overflow agreement – they will get behind and either they will require some serious help with backlogs or turn an enterprise solution back into a service bureau solution.

3. Front-end Solution – You do the prep, scan and indexing and they store and retrieve internally. You provide the following:

- ✓ Pick-up the documents and/or retrieve them from your Records Center
- ✓ Prep the documents for scanning
- ✓ Scan the documents
- ✓ Index the documents
- ✓ Deliver the documents – via CD, FTP, etc. to their network

Business Model (Con't)

4. Back-end Solution – They do the prep, scan and indexing and then store images via iChamber™. You provide the following:

- ✓ Sell/Recommend the hardware
- ✓ Assist in hardware installation
- ✓ Sell the software – Capture, Retrieval and any necessary add-on modules.
- ✓ Assist with install and support software (1st line)
- ✓ Front-end process training
- ✓ Software training
- ✓ Execute an overflow agreement – they will get behind and either they will require some serious help with backlogs or turn an enterprise solution back into a service bureau solution.
- ✓ Store documents via iChamber™

5. Scan on Demand Solution – This solution is for your existing clients and allows you to capitalize on the technology we are offering and potentially market to potential clients outside your normal delivery service area.

- ✓ Retrieve requested documents
- ✓ Prep the documents for scanning
- ✓ Scan the documents
- ✓ Index the documents
- ✓ Post to for web access or e-mail to end user
- ✓ Reassembly document
- ✓ Re-file document

C. Product Sheets

Please take a minute and read the following product sheets, which include a more in-depth and complete description of each of the software modules.



Scan, Index and Organize Documents to Simplify Management

PaperFlow is the most powerful, complete and full-featured document capture and indexing system on the market. Maximize your productivity with production-level scanning. PaperFlow works as a standalone system, as an integrated part of PaperVision® Enterprise and ImageSilo® or with a wide variety of other Enterprise Content Management (ECM) systems.

Convert Paper Records to Electronic Documents

- Scan and index hundreds of paper documents per minute into the ECM system or for export to any media.
- Handle all scanning needs in one centralized location or simultaneously at various sites.
- Eliminate keystrokes with the ability to read barcodes and handwriting, and process text with Optical Character Recognition (OCR).
- Verify captured data has been scanned and indexed properly with an optional quality control module.

Automate Capture Processes and Enhance Productivity

- Populate index values accurately by matching values and merging them with existing data instantly.
- Reduce time-consuming procedures with automated scanning and indexing.
- Improve efficiency with electronic image cleanup and formatting.
- Minimize operator intervention by automating import and export routines.



“For the past four years, our Trade Operations division has used PaperFlow to scan 6,000 documents every day. PaperFlow ensures the accuracy and reliability of our banking records for payment processing and credit issuance, and it allows us to significantly reduce the cost and labor needed to support our clients’ needs.”

- Fran Accardi, Vice President Business Consultant, Bank of America

Implement Cost-Effective Document Conversion

- Enjoy unlimited scanning, because there are no per-click fees.
- Leverage existing equipment, as PaperFlow is designed to integrate with hundreds of scanners at the manufacturers’ full-rated speeds.
- Configure the system in minutes with an intuitive point-and-click setup that does not require scripting or extensive training.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.



Scan, Index and Organize Documents to Simplify Management

PaperFlow is the most powerful, complete and full-featured document capture and indexing system on the market. Make PaperFlow the first component in your Enterprise Content Management (ECM) system. Whether you use our on-premise ECM model, PaperVision® Enterprise, our on-demand service, ImageSilo®, or any other document management system, PaperFlow will maximize your productivity.

Easy In, Easy Out

Capitalize on your investments, and put existing scanners to use. PaperFlow interfaces with hundreds of desktop and production-level scanners right out of the box. Automatically import information from existing systems, and capture documents from fax servers, fax machines and multifunctional devices. PaperFlow can scan and store documents on any media and export image and index information to a wide variety of document management systems. Through seamless integration, PaperFlow partners with PaperVision Enterprise and ImageSilo for a comprehensive Digitech Systems ECM solution.



Speed and Accuracy

PaperFlow enhances efficiency with innovative and timesaving features which take full advantage of production-level scanners running at their full rated speeds of 400 images per minute or faster. A customizable document indexing tool lets the user define acceptable index parameters to ensure accuracy. Extensive auto-formatting and verification procedures minimize keystrokes while support for barcodes, Optical Character Recognition (OCR) and handwriting recognition eliminates keystrokes altogether. Extract information from existing databases, and use it to populate indexes automatically with match and merge capabilities. Automation simplifies time-consuming processes, such as image cleanup and document exports.

Rapid Deployment

Immediately improve productivity and performance without extensive new product training. Setup takes minutes, as PaperFlow's point-and-click interface is easy to use and requires no coding or scripting. Predefined import and export formats create built-in functionality for immediate results with virtually any ECM system. Tailor system functionality for specific users, such as scan or data entry operators, and make use of keyboard shortcuts or "hot keys" for one-touch execution. Centralized administration simplifies project setup and ongoing management.

Suite Options

Implement a comprehensive scanning and indexing solution with these optional components.

Guarantee document quality - QCFLOW™

Verify captured data has been scanned and indexed properly. Operators can move manually through the documents at their own pace and tag images for reprocessing or automate the process in a hands-free mode. Changes can be made to multiple documents or the entire batch of index information at one time.

Convert scanned images to searchable text - OCRFLOW™

OCRFlow converts images to text, enabling text-based search capabilities. It enables you to find the document you need from a single word or passage and displays references in context. Operators can select which documents to recognize or they can choose to process all documents. Both processing and exporting can be automated to occur at any time.

Unlimited Scalability

No matter how you conduct business, PaperFlow can scale to meet your needs. Scanning can be handled in one centralized location, simultaneously in various locations throughout an organization or offsite as an outsourced service. Establish any number of scanning stations for a departmental or corporate-wide installation. Create production-level operations with unlimited system users, scanning projects and images. Automated imaging activities can be scheduled to occur at any time, even during off-peak hours. Because of its unlimited scanning and indexing capabilities, companies whose livelihoods depend on consistent, quality scanning choose PaperFlow.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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PaperFlow, QCFLOW and OCRFlow are trademarks of Digitech Systems, Inc.



Technical Specifications

PaperFlow facilitates high-volume scanning and indexing and interfaces with hundreds of desktop and production-level scanners to create a departmental or corporate-wide solution. As an optional, separately licensed product, it works as a standalone system, as an integrated part of PaperVision® Enterprise or ImageSilo® or with a wide variety of other document management systems.

System Overview

- Scan to any media, on any network configuration, providing full storage and network independence
- Simple point-and-click interface requires minimal training
- Simple navigation, scaling, searching and rotation options for accurate and detailed image verification
- Extensive use of keyboard shortcuts greatly improves operator productivity
- Barcode and zonal OCR automate indexing, eliminating the need for manual data entry
- Powerful scanning options allow you to define automatic page dropout, rotation and document breaks
- Efficient index manager reduces keystrokes and errors
- Multiple indexes can reference a single image
- Effortlessly merge multiple documents into a single document
- Image cleanup operations, including line and noise removal, de-skew, border removal and character enhancement, ensure the best quality image
- Optional QCFlow™ ensures the highest quality of scanned documents
- Optional OCRFlow™ enables full-page OCR processing of scanned documents
- All upgrades are included with annual maintenance, ensuring access to the latest product features and benefits
- Toll free, legendary technical support is eager to assist with any questions you may have

Security

- User login is required and protects the system from unauthorized use
- User- and group-level security limit access to system functionality and control user activity
- The system verifies user rights to ensure access is provided only to authorized users
- Only system administrators can alter security settings, enhancing security and accountability

Scalability and Reliability

- Support for over 300 scanners running at their full-rated speeds
- Centralized project setup and security eases administrative overhead
- Unlimited clients, projects and images can be handled from a single station
- Extensive configuration options allow you to tailor the system to fit your scanning needs
- Powerful automation engine performs routine operations during off-peak hours
- Built-in FTP engine provides for distributed scanning environments
- Detailed production reports keep track of productivity
- Detailed summary reports provide general billing statements

Integration

- Direct integration with PaperVision® Enterprise and ImageSilo® eliminates the headaches of implementing a multi-vendor solution
- Import existing images from archives or from other applications with or without existing index information
- “Match and merge” function automatically populates index fields with data from existing databases
- Customized exports to over 100 different document management and imaging systems

System Requirements

- Microsoft® Windows® 98 or higher, excluding Windows® Vista x64
- Available memory as specified by operating system manufacturer
- 145MB available disk space for installation of program files

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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PaperVision® Enterprise

Securely Manage Information to Improve Business Efficiency



Control access and increase information security using a simple, searchable Enterprise Content Management (ECM) system. Enable automation and tracking of business processes throughout the information lifecycle.

Improve Business Processes

- Reduce information retrieval times and enhance customer service with comprehensive ECM.
- Access and manage files directly from Microsoft® Office and other line-of-business applications.
- Give employees more time to focus on primary business objectives by automating document processes.

Protect Information from Theft and Disaster

- Implement information policies with multiple levels of security and extensive user controls.
- Shield information with encryption both during transmission and when stored.
- Facilitate a disaster recovery strategy with automated backups and redundant copies of information.



“PaperVision Enterprise allowed us to trade administrative expenses for revenue generating investments.”

- Hawley MacLean, President, MacLean Financial Group

Comply with Regulations and Electronic Discovery Guidelines

- Ensure proper procedures are carried out by automating compliance processes and tracking activity.
- Enforce compliant disclosures by requiring users to record who received information and why.
- Gain regulatory confidence with evidence of audit trails, security controls, user activity, document history and records retention policies.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

PaperVision® Enterprise

Securely Manage Information to Improve Business Efficiency



PaperVision Enterprise delivers any document, anywhere, anytime—including email. Securely organize, store and retrieve information in the blink of an eye. Control and manage information of any kind in an easy-to-use, easy-to-implement Enterprise Content Management (ECM) system.

Unlimited Scalability

PaperVision Enterprise can run on a single desktop computer or thousands of computers in distributed locations. The same application can reliably scale across multiple application servers, web servers and database servers, all of which can be leveraged, tiered and load-balanced to fit organizations of any size. We prove it everyday! Digitech Systems' own ImageSilo® is the world's largest known installation of PaperVision Enterprise.

Intelligent Search

Easy-to-use, powerful search capabilities allow users to locate any information in seconds. Perform detailed searches with specified date and value ranges or very broad searches across multiple index fields or projects. Full-text search capabilities pinpoint key words within the content of the document. Users can also print, export and email documents individually or as a group.



Flexible Security Controls

PaperVision Enterprise provides extensive security configurations. Administrators control who can read, change or share documents through multiple security levels that limit users' information access and system abilities. Data encryption can occur both during transmission and when stored. Records retention and destruction policies, evidence of security controls and extensive audit trails enable companies to comply with government and industry regulations.

Efficient Collaboration

By providing powerful check-in/check-out and versioning controls, PaperVision Enterprise ensures that users are working on the latest, most accurate version without the fear of overwriting each other. PaperVision Enterprise supports virtually any type of information, including electronic files, paper records, images, print streams and even email messages. Store and retrieve more than 250 file types in their native file formats. PaperVision® Data Transfer Manager enables companies to maintain a duplicate copy of all data at a separate site for disaster protection. Package all data into a single, encrypted, compressed file and transfer it between sites through FTP or secure FTP.

Suite Options

Implement a comprehensive, automated ECM system with these additional components.

Email management - PAPERVISION® MESSAGE MANAGER

Automated business processes - PAPERVISION® ENTERPRISE WORKFLOW

Print stream processing - PAPERVISION® ENTERPRISE REPORT MANAGEMENT

Data replication and remote administration - PAPERVISION® ENTERPRISE ADVANCED ADMINISTRATION PACK

Unlimited file distribution - PAPERVISION® DISTRIBUTION ASSISTANT

Seamless Integration

PaperVision Enterprise works effortlessly with Microsoft® Office—right out of the box. By implementing PaperVision® Enterprise Tools, users can upload files directly and control document versions using Microsoft Office toolbars and menus. Even better, a point-and-click integration module and API capabilities enable seamless integration with virtually any application. Users won't have to leave their line-of-business software to store and retrieve critical corporate data. Plus, you'll enjoy the peace of mind that comes from knowing all your important information is securely managed in the ECM system.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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PaperVision® Enterprise



Technical Specifications

System Overview

- System includes embedded MSDE/SQL Server Express database server and full support for Microsoft® SQL Server
- Native viewing of more than 250 file types allows you access to any document
- Versioning and check-in/check-out functions include detailed audit tracking and simplified roll-back processes
- Up to 200 unique index fields can be defined for each document
- Annotations allow the ability to redact, or hide, certain information within a document from specific users or to add textual notes to a document
- Extensive full-text search capabilities that support synonym, stemming, fuzzy logic, phonic, proximity, Boolean, natural language and variable term weighting search options with results displayed in statistically ranked order
- Document grants allow external users limited access to specified documents via a browser-accessible, encrypted URL link
- Directory Manager automates the importing and indexing of documents from any source media including multi-function devices, network-attached scanners and/or photocopiers
- Scan2PVE allows users to scan and upload documents directly from a scanning device into PaperVision Enterprise, making any installation an ad hoc scan station for distributed scanning
- Scan2PVE enables users to add, move or delete pages within a document as well as maintain version control on those documents
- Configure retention policies to protect records from destruction during specified time periods
- Set destruction policies to purge expired records
- Send an email notification or require review prior to destruction of any document
- Detailed audit trails and disclosure data gathering assist in complying with industry and government regulations, including HIPAA for the healthcare industry, 21CFR Part 11 for FDA regulations and more
- Extensive reporting capabilities track system and user activity, including records retention and destruction activities
- A single-sign on via windows-integrated authentication simplifies the login process
- FREE PaperVision® Message Manager component imports, captures and organizes email messages
- Optional PaperVision® Enterprise Advanced Administration Pack component provides web-based system administration, including project management and security settings for flexibility and convenience

- Optional PaperVision® Enterprise Advanced Administration Pack also offers data replication capabilities that use advanced journaling techniques for real-time replication to one or more back up storage locations
- Optional PaperVision® Enterprise WorkFlow component, with easy-to-use graphical interface, automates the flow of information through routine business processes
- PaperVision Enterprise WorkFlow and Scan2PVE work together to allow users to capture documents and upload them into a new or existing workflow process
- Optional PaperVision® Enterprise Report Management processes COLD/ERM print stream data into electronic reports and imports and indexes them into the ECM system
- Optional PaperVision® Distribution Assistant allows unlimited file distribution outside the ECM system and provides an embedded viewer
- All upgrades are included with annual maintenance, ensuring access to the latest product features and benefits
- Complete, detailed online help includes step-by-step instructions to get you started quickly
- Toll free, legendary technical support is eager to assist with any questions you may have

Security

- 256-bit AES encryption occurs during import, during transmission, optionally when data is stored and in communication with other PaperVision Enterprise products
- Session ID encryption ensures that a session ID cannot be guessed to hijack a session
- Support for Secure Sockets Layer (SSL) and non-standard ports ensures data transmission security
- Session-source validation and IP address limiting guarantees users can access the system only from authorized locations
- Automatic session termination closes a user's session when it sits idle for a defined period of time
- Function-level security verification is performed for every API call made to PaperVision Enterprise, whether from the application or through API calls
- Security-policy administration tools include account lockouts, password complexity requirements and expiration
- Entity-level security defines company-wide security settings
- Group-level security assigns a common set of access rights to all users within a group
- User-level security defines individual user permissions
- Project-level security assigns functionality-based security at the project level
- Document-level security allows for more specific security settings down to the individual document

PaperVision Enterprise Technical Specifications

- Function security controls user rights, such as printing, emailing, exporting and deleting
- Index-level security controls user ability to view and/or edit document index fields
- Grant users the ability to create retention locks, to set destruction dates and to approve or deny documents scheduled to be destroyed
- Company administrators can configure their own security policies, including encryption and records retention policies

Scalability and Reliability

- Browser-based or desktop client installation with identical functionality
- Centralized administration console is included and provides access to all administrative functions
- Support for multiple database servers accommodates growing storage needs
- System supports an unlimited number of companies and projects
- Full support for hardware load-balancing and Windows® Network Load Balancing provides additional reliability and scalability
- Innovative support for process redirection enables offloading of processor-intensive activity to specialized servers
- Automated report archiving allows you to decide how many entries are retained, while the rest are archived automatically
- Automation service improves productivity by automating backup processing, maintenance jobs and data imports
- Automated importing of files, including email, network files and print stream data
- Backup processing enables organizations to package a duplicate copy of data into a single, encrypted, compressed file for data replication
- Data Transfer Manager sends packaged backup files (through FTP or secure FTP) to a separate site for disaster protection

Integration

- Extensive use of web services supports integration and cross-platform compatibility
- COM-based APIs support both local and remote communications without requiring modification to code
- ActiveX® (OCX) controls can be embedded into third-party applications
- Customizable source code is included for both browser-based and desktop client applications
- Integration Manager enables point-and-click integration with third-party applications
- PaperVision® Enterprise Tools provide out-of-the-box integration with Microsoft® Office applications, including Word, Excel, PowerPoint, Outlook and Windows Explorer
- Scan2PVE is compatible with any TWAIN-enabled scanning device to input single or multi-page documents directly into PaperVision Enterprise
- Optional PaperVision® Enterprise Advanced Administration Pack provides additional API integration tools to automate administrative functions
- Integration with Microsoft® Office SharePoint® Server 2007 enables companies to leverage the PaperVision® Enterprise document management and workflow functionality directly within their SharePoint portal

System Requirements

- Microsoft® Windows® XP or higher
- Internet Explorer® 6.0 or higher, Mozilla® Firefox® 1.5 or higher
- Microsoft® Internet Information Services 5.0 or higher
- 256 MB RAM
- Approximately 50 MB of hard disk space
- Additional storage space for stored data

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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PaperVision® Enterprise Report Management



Convert Print Streams into Practical Electronic Reports

Process, organize, index and display print streams in easy-to-read electronic reports. Make data more accessible and easier to manage with the ability to print, fax and distribute in an electronic format from PaperVision® Enterprise or ImageSilo®.

Simplify Report Management

- Streamline business with automated print stream processing that makes data manageable and searchable.
- Manage everything from one system that indexes, searches, displays and distributes reports.
- Control report quality before processing by previewing fully formatted samples with index values.

Reduce Data Management Costs

- Reduce printing and storage for large volumes of documents with electronic reports.
- Distribute information quickly and cost effectively by searching and emailing reports.
- Reduce approval processing time by automatically routing reports through standard business procedures.



“I couldn’t imagine the complexity of COLD/ERM data processing without PaperVision Enterprise Report Management. It plays a huge role in the way we process business critical information and makes forms processing a breeze. Report Management is very powerful and extremely easy to use. Once configured, it just works! With thousands of invoices to manage every week, we use Report Management daily and process invoices in seconds.”

- Steve Todd, Director of Information Systems, Polar Imaging, Inc.

Improve Process Efficiency

- Configure processing jobs easily, without scripting or programming, using point-and-click setup.
- Process information when it’s convenient and during off-peak hours with user-defined schedules.
- Maximize storage space without compromising speed by compressing files to approximately one-third their original size.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

Many organizations depend on large mainframe systems and other high volume computing solutions to crunch through mountains of printed data for invoicing, human resources or inventory management. PaperVision Enterprise Report Management features a COLD/ERM and print stream data processing engine to capture, process, store and distribute data in easy-to-read reports. Best of all, this product is available with our on-premise (PaperVision® Enterprise) and on-demand (ImageSilo®) Enterprise Content Management (ECM) systems.

File configuration is simple, because Report Management uses a point-and-click setup that doesn't require scripting or programming. Sophisticated tools analyze the file and guide the user in defining document parameters, identifying line and page breaks and replacing or removing specified characters.

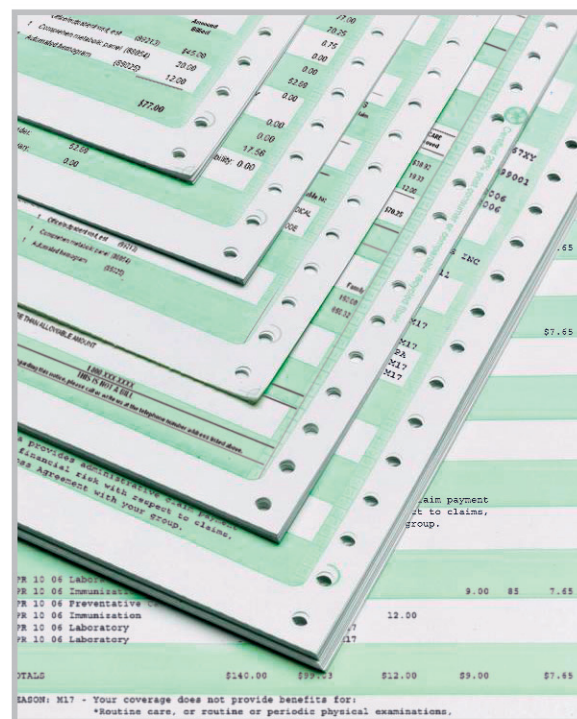
Ensure accuracy by previewing even the largest reports prior to processing the entire job. Pre-processing samples show index values and display fully formatted examples with columns and lines in appropriate locations. Report Management presents the proper background form for any page of the report.

Process and index data while you sleep and gain maximum efficiency! Report Management detects and processes new reports on a user-defined schedule. After a one-time setup, Report Management extracts indexing information and converts data into a readable and searchable electronic report. Since data is already in a text format, the ECM system's full-text search capabilities are immediately available.

Sensible file compression maximizes storage space without compromising speed. Using a non-proprietary, industry standard method of compression, the data is reduced to approximately one-third its original size, providing a delicate balance between storage maximization and processing time. In addition, intelligent retrieval does not require that the entire file be decompressed before it is accessible; each component is displayed as it is decompressed.

Manage reports using PaperVision Enterprise or ImageSilo for instantaneous retrieval, which allows organizations to distribute data without the need to print and scan the source document. Use PaperVision® Enterprise WorkFlow to automatically route processed reports through pre-defined steps and standard business procedures. Report Management leverages all the security, scalability, reliability and integration options of the ECM system to guarantee the integrity and availability of the data.

Easy-to-use, powerful search capabilities allow users to locate any information in seconds. Perform detailed searches with specified date and value ranges or very broad searches across multiple index fields and projects. Full-text search capabilities pinpoint key words within the content of the document. Users can also print, export and email reports individually or as a group.



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PaperVision® Enterprise Report Management



Technical Specifications

PaperVision Enterprise Report Management is an optional, separately licensed module of PaperVision® Enterprise and a separately purchased service for ImageSilo® that processes COLD/ERM print stream data. Report Management is part of a suite of Enterprise Content Management (ECM) products that also includes solutions for email management and automated document routing.

System Overview

- Direct integration with PaperVision® Enterprise and ImageSilo® eliminates the complication of implementing a multi-vendor solution
- Elegant graphical user interface simplifies job setup via point-and-click techniques that require no coding or scripting
- Import during processing to ensure immediate data availability
- Search and extraction capabilities support fixed or floating anchors to process variable data
- Easy access to job run status enables quick verification of successful operations
- Strong textual validation techniques, with optional use of regular expressions, ensure accurate data extraction
- Detailed error logs post all errors to comprehensive reports, which are available to administrators for review
- System logs track errors while engine continues processing subsequent jobs
- Process locks ensure that report processing is assigned to the proper servers and workstations in high-demand applications
- Optional file compression uses industry standard compression technology to improve storage capacity
- Powerful file-analysis tool recommends job setup and maximizes efficiency
- Flexible configurations for line, page and document breaks dramatically simplify disparate job setups
- Forms overlay allows the presentation of processed text as an original document for printing or emailing featuring the ability to present the proper overlay depending on page number or content on the page itself
- Report Management job setups, including forms overlays, are easily transported via XML exports and imports to share setups from one PaperVision Enterprise system to another
- All upgrades are included with annual maintenance, ensuring access to the latest product features and benefits

- Complete, detailed online help includes step-by-step instructions to get you started quickly
- Toll free, legendary technical support is eager to assist with any questions you may have

Security

- This add-on product is fully protected and supported by the same security features and capabilities of PaperVision Enterprise or ImageSilo (see ImageSilo and PaperVision Enterprise product sheets for details)
- Encryption of data during capture processing protects information from the beginning

Scalability and Reliability

- An unlimited number of servers can process an unlimited number of jobs simultaneously
- Processed information can be grouped into manageable sets of data
- System enables job setup previews by displaying resulting output (complete with document index values and form overlays) to ensure report accuracy before actual processing begins

Integration

- Full support for ASA/ANSI with channel commands, including both static and custom channel commands
- Full support for AS/400 spool file commands interprets standard control codes that appear in AS/400 spool files
- Easy setup requires no coding or scripting
- System-guided file-translation features for ASCII or EBCDIC
- Various EBCDIC translations including CP037 US/Canada 3270 Superset, CP500 International Latin 1 and Base 3270 ASCII Subset
- Configurable character-replacement capability can remove unwanted characters before processing
- Graphical editing of form overlays dramatically simplifies placement and display of final output
- An XML job-processing library of portable job definitions (including form overlays) can be created to simplify new job setup

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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Guarantees quality of documents.

Exceptional quality is a corporate necessity. It should be easier. It should be less expensive. With QCFlow, it is.

QCFlow verifies that captured data has been scanned and indexed properly. If so, you rest easy. If not, QCFlow provides a host of intuitive, manual and automated tools to render data precisely correct. Avoid costly mistakes.

QCFlow offers an array of routines to guarantee the quality of scanned images. QCFlow makes the job **effortless and efficient**. Using a thumbnail view, operators can rapidly view images for overall quality. If any question should arise, any image can be instantly viewed in fine detail. Problem documents can be tagged for seamless reprocessing in PaperFlow™.

Operators can move manually through the documents at their own pace, or automate the process in a hands-free mode. When needed, the hands-free operation can be paused for closer inspection. The operator decides whether to view every page of a document or skip a specified number of pages. QCFlow can even reorder pages within or between documents, or move pages from multiple documents into another simultaneously. This eliminates abandoned pages that were scanned out of order or into the wrong document.

Once the overall image quality has been achieved, QCFlow can perfect the index data. Not by the painstaking method of most competitors where you change one document at a time, but by having **the ability to effect changes on multiple documents or entire batches of index information at one time**. Users can easily perform index field validation and data reformatting. If invalid data is identified, QCFlow will instinctively tag the document for an operator to verify and re-enter. It is just as easy to validate the numeric sequence of data within a batch of documents. You'll know that every invoice or check has actually been captured.

Many functions of QCFlow can be automated, allowing batch operations to take place during hours when equipment would normally be idle. QCFlow allows automatic verification of acceptable image file size, image width and height, number of pages within documents and index field values. Any documents in the automated batch that do not meet the acceptable parameters are tagged for operator review at a later time.

QCFlow is a seamless and logical fit with PaperFlow, Digitech's high-speed document capture software. They are a perfect pair. **With QCFlow, you'll always have the ability to save a perfect document.** Digitech makes quality a priority.

Technical

SYSTEM OVERVIEW

- **Direct integration with PaperFlow™** ensures the highest quality of scanned documents
- **Access multiple data sets from one station** to improve productivity
- **Easy-to-read, comprehensive user manual** includes step-by-step instructions to get you started quickly
- **As with all Digitech products, initial annual support and maintenance are included**, lowering your cost of ownership
- **All upgrades are included with annual maintenance**, ensuring access to the latest product features and benefits
- **Toll free, legendary technical support** is eager to assist with any questions you may have

ADMINISTRATION

- **Integrated security with PaperFlow** eases administrative overhead
- **Simple point-and-click interface** requires minimal training
- **Maps directly to active PaperFlow data groups** to provide seamless integration
- **Extensive use of keyboard shortcuts** greatly improves operator productivity
- **Support for command-line operations** provides integration with external processes

AUTOMATED OPERATION

- **Completely automated “lights-out” processing** of image validation
- **Systematically reviews image file sizes and tags** documents that fall outside of user-defined parameters
- **Examines document page counts** to ensure that all relevant data has been captured
- **Verifies that image dimensions are accurate** to catch double-feeds

INDEX QUALITY CONTROL

- **Checks for indexing errors and flags** values that do not meet predefined criteria
- **Checks numeric sequence** to ensure that all documents in a series are present; useful for check scanning and more
- **Inserts or removes leading zeros** to automate proper formatting of barcode-read or manually indexed values
- **Strips leading or trailing characters** to easily remove superfluous index data
- **Easily finds index discrepancies** from a simple, integrated search interface

MANUAL IMAGE QUALITY CONTROL

- **Thumbnail and full image views** allow you to easily toggle multiple images and detailed view of a single image
- **Easily navigate across thousands of documents** in full-page or thumbnail modes
- **Easy-to-identify, color-coded denotation** of corrupt or missing images
- **Automates image viewing process** to display a user-defined number of images within a user-defined time frame
- **Easily zooms, rotates and scales images** to display detail of your scanned page
- **Inserts and removes document breaks** quickly and effortlessly
- **Moves pages quickly** from one document to another
- **Tags pages and documents** with user-defined tags to notify PaperFlow users of actions required

SYSTEM COMPONENT REQUIREMENTS

Microsoft® Windows® 98/2000/ME/XP or Windows NT® 4.0 (SP3) or higher
64MB Memory
40MB available disk space for installation of program files
VGA or higher resolution monitor
CD-ROM Drive

Converts scanned images to text.

Converting images to searchable text. It should be easier. It should be less expensive. With OCRFlow, it is.

OCRFlow works in conjunction with PaperFlow™ and PaperVision® Enterprise to provide text-based search capabilities. It allows a user to find any word among an unlimited range of documents.

Index-based searching is important and useful for most scanning projects, but it can also be time consuming and subject to human error. OCRFlow integrates the most precise Optical Character Recognition (OCR) engines and intuitive quality control measures to guarantee that processed text is accurately recognized, with minimal operator intervention. **OCRFlow saves you money by reducing time spent on expensive manual indexing.**

Full-text searches are particularly useful in finding specific words or wording in reams of documents. For instance, attorneys can quickly and easily find references to a specific name, date, address or subject matter. **Search results instantly identify all of the references and how they appear in the context of a sentence.** The user can then go directly to the relevant page within the document. In addition, this full-text data can be further manipulated and shared across various applications, significantly reducing the need for editing and rewriting. A point-and-click user interface allows both inexperienced and advanced users to take advantage of **the most powerful and accurate OCR technology available.**

OCRFlow converts text while keeping fonts, graphics and their relative positioning on a page intact. The operator selects which documents within a project to recognize, or can choose to process all of the documents. **Digitech's renowned simple, yet elegant, design allows operators of all experience levels to utilize the system with minimal training.**

OCRFlow provides extensive quality control to aid in perfect translation of image data. Displaying the original image on the top half of the screen and the translated text on the bottom, **OCRFlow automatically highlights questionable words and characters. It allows the operator to compare documents,** make any changes and save the revisions.

Processed work can be exported back into the original PaperFlow data for full-text searching within PaperVision, or into a number of external file formats such as Adobe® PDF, HTML or Microsoft® Word, for use in corresponding secondary applications. **Both processing and exporting can be automated to occur at any time, including during off-peak hours.**

OCRFlow can read the details of your documents. **It enables you to find the document you need from a single word or passage.** It then helps you manipulate and distribute that information with ease. Easy in. Easy out. Money saved.

Technical

SYSTEM OVERVIEW

- **Direct integration with PaperFlow™** ensures full-text processing of scanned documents
- **Integrated quality control engine** ensures conversion accuracy
- **Access multiple data sets from one station** to improve productivity
- **Easy-to-read, comprehensive user manual** includes step-by-step instructions to get you started quickly
- **As with all Digitech products, initial annual support and maintenance are included**, lowering your cost of ownership
- **All upgrades are included with annual maintenance**, ensuring access to the latest product features and benefits
- **Toll free, legendary technical support** is eager to assist with any questions you may have

ADMINISTRATION

- **Integrated security with PaperFlow** eases administrative overhead
- **Simple point-and-click interface** requires minimal training
- **Maps directly to active PaperFlow data groups** to provide seamless integration
- **Support for command-line operations** provides integration with external processes

AUTOMATED PROCESSING

- **Recognize all documents** in a "lights-out," automated process
- **Automatically determines and maps text, graphics and tables** and retains overall document layout for output
- **Full-text processing of all text and tables** ensures accurate translation of source documents
- **Automated output processing** maximizes efficiency without increasing labor costs
- **Activity logs** track job start and end times, errors that may occur during processing and job status

QUALITY CONTROL (QC)

- **Completely integrated quality control process** allows verification of recognized data
- **View original image and recognized text at the same time**, simplifying verification
- **Alter recognized text "on-the-fly"** for quick corrections and greater accuracy
- **Highlights suspect words and characters** to draw user's eye to potential changes that must be made
- **Easily zoom in on processed image section** to focus on suspect words
- **Image section also receives highlights** as user makes changes on recognized text to simplify consistency
- **Easily navigate between documents and pages** without taking your fingers off the keyboard

SYSTEM OUTPUT

- **Native output to PaperVision® Enterprise** significantly reduces costs associated with manual indexing
- **Integrated outputs to over 35 external file formats**, including ASCII, HTML, Rich Text, Microsoft Word and Excel, and Adobe PDF
- **Full array of output options for external file formats** allows you to "fine-tune" the resulting documents
- **Output only QC'ed documents or all documents** to ensure only completely processed documents are delivered
- **Output single or multi-page documents**, depending on preference for delivery
- **Easily define output file name schema** for simple file organization

SYSTEM COMPONENT REQUIREMENTS

Microsoft® Windows® 98/2000/ME/XP or Windows NT® 4.0 (SP6) or higher

64MB Memory

65MB available disk space for installation of program files

SVGA or higher resolution monitor

CD-ROM Drive

For a complete product listing please visit www.digitechsystems.com or call toll free at 888.374.3569.

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PaperVision® Message Manager



Store and Index Email Messages for Easy Retrieval

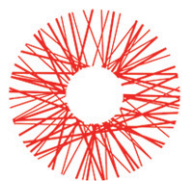
Automatically capture email messages and attachments in PaperVision® Enterprise or ImageSilo®. Index messages for faster retrieval and apply user-defined rules to govern where and which messages are stored in the secure Enterprise Content Management (ECM) system.

Simplify Email Management

- Manage messages without changing email software, as Message Manager works with virtually any system, including Yahoo!®, Gmail™ and UNIX®- and LINUX®-based email systems.
- Enhance user adoption with automated capture policies and indexing capabilities that do not require users to modify the way they use email accounts.
- Set up the system in minutes—just define policies and forward or journal messages to a mailbox monitored by Message Manager.

Reduce Email Management Costs

- Save days retrieving archived email by utilizing automatically generated indexes to search for email in your ECM system.
- Conserve valuable storage space with user-defined policies that filter out unwanted email.
- Reduce costly delays by leveraging incoming email to promptly kickoff an automated business process.



NUCLEUS
RESEARCH

“Most companies have recognized email is a communication of record that needs to be managed, but few have integrated it into their overall information management strategy. Digitech Systems’ Message Manager rounds out the company’s complementary technology options and provides companies of all sizes with a cost-effective email management, information management and compliance strategy.”

- Rebecca Wettemann, Vice President, Nucleus Research, Inc.

Comply with Regulations

- Create a complete email records system by capturing archived and real-time messages.
- Prove that stored messages have not been altered and verify integrity with non-repudiation technology.
- Respond to legal requests in a timely manner using full-text searches to retrieve messages in seconds.
- Ensure system integrity by tracking capture policy changes.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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PaperVision® Message Manager

Store and Index Email Messages for Easy Retrieval



Email messages are important business records. PaperVision Message Manager allows an organization to automatically route messages and attachments into PaperVision® Enterprise or ImageSilo®, index messages and govern where and which messages are stored in the secure Enterprise Content Management (ECM) system.

Email at Your Fingertips

Capture email messages and attachments, and sort and store messages based on user-defined policies. Automated capture and indexing reduce errors and administrative workload, while organizing email based on sender, receiver, date, subject, attachment name or other index values. Instantly retrieve any message based on these values and pinpoint keywords or phrases using full-text search. By implementing PaperVision® Enterprise Tools, users can also upload existing email directly into PaperVision Enterprise or ImageSilo projects without ever leaving Microsoft® Outlook. Whether regulations require businesses to store all messages or only critical business communications, Message Manager will control every email you need.



Email Integrity and Authenticity

Using non-repudiation, companies can verify stored messages haven't been altered and use this proof to comply with government regulations. Non-repudiation assigns a unique value to each message and compares messages with originally captured versions. If messages are changed, the unique values do not match, and the system won't display the altered message.

Flexible System Options

Capture email messages from virtually any email account, including UNIX®- and LINUX®-based email systems, and web-based systems like Yahoo!® and Gmail™. For Microsoft® Exchange mail systems use the journaling feature to capture messages. For web-based and other email providers, simply forward email messages to a mailbox monitored by Message Manager.

Archived Email Included

Easily capture archived messages from Microsoft® Outlook and Exchange mailboxes. Message Manager gathers email messages that have already passed through the email system and are now stored in .pst files or .msg-formatted messages. Capture and index message content for storage in the ECM system. Message Manager organizes everything into one convenient, searchable location.



Powerful Functionality

Messages imported into the ECM system are indexed and retrieved using the features and functionality of PaperVision Enterprise or ImageSilo. Message Manager leverages all the security, scalability and reliability of the ECM system to guarantee the integrity and availability of the data. Stored messages are safeguarded and tracked by the same information security controls. ®

Email On-Demand

Access archived email remotely, anywhere, anytime! Combine Message Manager with ImageSilo and enable compliance, disaster recovery and information management with a simple service that doesn't require expensive hardware, consume capital resources or burden IT personnel.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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PaperVision® Message Manager



Technical Specifications

PaperVision Message Manager is an optional, separately licensed module of PaperVision® Enterprise and a separately purchased service for ImageSilo®. PaperVision® Message Capture Server provides a solution for capturing and evaluating email messages as they traverse your email delivery system. PaperVision® Message Manager Harvester captures historic email messages. Both are included with the purchase of PaperVision Message Manager. Message Manager is part of a suite of Enterprise Content Management products that includes solutions for automated document routing and COLD/ERM print stream processing.

System Overview

- PaperVision® Message Manager captures both active and archived email messages
- Works with PaperVision® Enterprise WorkFlow to automatically route email messages and attachments, initiating workflow processes and email notifications
- Rules-based capture ensures necessary messages are retained and unwanted messages are filtered out based on user-defined criteria
- Full-text search of email messages and attachments allow pinpoint accuracy in locating data
- Automatic indexing of email is based on metadata, including sender and recipient information
- Powerful search capabilities locate and retrieve messages in seconds
- Simplified capture through journaling or by forwarding active and archived messages
- Non-repudiation and integrity verification assist in complying with industry and government regulations, including electronic discovery, Federal Rules of Civil Procedure (FRCP), SEC, SOX and more
- One-step setup captures all email for quick installation
- Message compression can occur before storage to conserve space
- All upgrades are included with annual maintenance, ensuring access to the latest product features and benefits
- Complete, detailed online help includes step-by-step instructions to get you started quickly
- Toll free, legendary technical support is eager to assist with any questions you may have

Security

- This add-on product is fully protected and supported by the same security features and capabilities of PaperVision Enterprise or ImageSilo (see ImageSilo and PaperVision Enterprise product sheets for details)
- Encryption can occur during data capture

- Non-repudiation detects tampering of email message content
- Secure connection with PaperVision Enterprise to update policies and settings

Scalability and Reliability

- Message Manager can be configured to include as many or as few mailboxes as necessary
- System can consolidate messages from unlimited locations and servers
- Organizations can add Exchange servers, other email servers or mailboxes at any time
- A single message can be captured for storage in multiple PaperVision Enterprise or ImageSilo projects

Integration

- Message Capture Server captures active messages from virtually any email system, including Microsoft® Exchange Server, POP3 and IMAP-compliant mail systems and UNIX®- and LINUX®-based email systems
- Message Manager Harvester collects historic messages from Exchange Server or Microsoft® Outlook .pst files
- Message Manager integrates with Microsoft® Active Directory® and LDAP to simplify IT management
- Simple setup requires no integration with mail servers

System Requirements

- Windows 2003 Server® or Windows Server® 2008 (Message Capture Server)
- Microsoft® Windows® XP or higher (Message Manager Harvester)
- Approximately 20 MB of hard disk space
- Additional storage space for stored email
- Microsoft® Outlook or the Microsoft® Exchange System Manager utility, such as Exchange 5.5, 2000, 2003 and 2007 (Message Manager Harvester)

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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PaperVision® Enterprise WorkFlow

Automate Document Routing to Streamline Business Processes



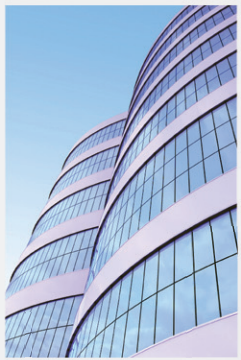
Make standard business operations easy to execute and easy to manage by electronically routing documents, alerting users of pending work assignments and tracking progress step by step using PaperVision® Enterprise or ImageSilo®.

Create Process Efficiency

- Make tasks easy by providing workstep instructions and putting all the necessary data at your fingertips.
- Identify process inefficiencies and bottlenecks with continually updated reports showing document status.
- Gain competitive advantage by electronically controlling business processes from the office or via the internet.
- Integrate email quickly into business practices using email and attachments to initiate a workflow process.

Improve Customer Service

- Increase customer satisfaction by decreasing document processing time.
- Respond to customer requests quickly with prioritized work queues and time-sensitive alerts.
- Give customers instant answers by electronically viewing the status of their request from your desktop.



“WorkFlow helps us keep tight control over the incoming mail and the paper documents we receive. Instead of paper piling up on desks, we have electronic reports showing us who has the document and where it is in the business process.”

- Keith Oufnac, Director of Information Systems, Eustis Insurance

Enhance Security and Compliance

- Provide documented evidence of compliant procedures with detailed audit reports.
- Monitor compliance by tracking live document progress with continually updated activity reports.
- Ensure proper procedures are completed within set timeframes by receiving alerts showing stalled or inactive documents.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

PaperVision® Enterprise WorkFlow

Automate Document Routing to Streamline Business Processes

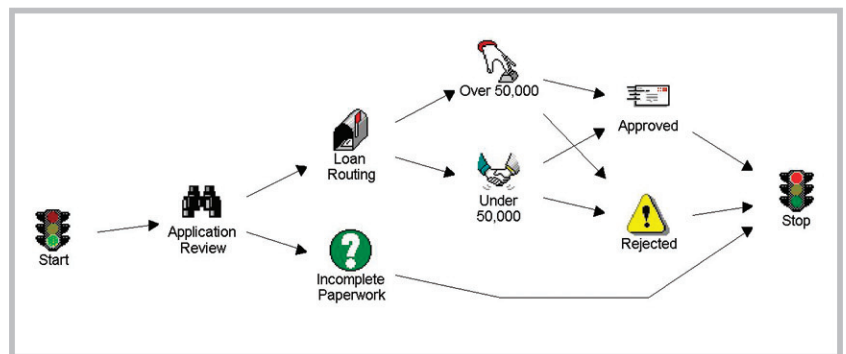
PaperVision Enterprise WorkFlow is the ultimate in business process management. WorkFlow enables businesses to fully automate standardized business processes, routing any document, anywhere, anytime, all while tracking the process and alerting users of new work assignments. Best of all, this product is available with our on-premise (PaperVision® Enterprise) and on-demand (ImageSilo®) Enterprise Content Management (ECM) systems.

Graphical Setup

To set up WorkFlow procedures, administrators use an icon-based, graphical diagram for simple point-and-click creation. For example, a mortgage administrator can effortlessly navigate thousands of mortgage applications through an otherwise complex loan approval process. Even if a loan application arrives via email with attachments, the system can initiate the process and forward the attached documents. When a procedure is complete, approved loan documents can be emailed to the appropriate manager.

Automated Processing

Users can be instantly notified when new assignments are available, and they are instructed on the tasks to be completed before the workstep can move forward. Workers can then make decisions with all the relevant data available at their fingertips. These decisions translate into proper routing and timely assessments, which drive profitability, increase customer satisfaction and enable compliance.

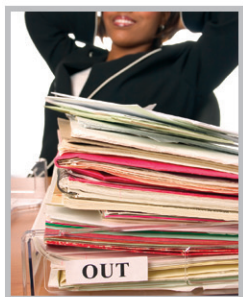


Effortless Administration

Single or multiple WorkFlow administrators can simultaneously manage an unlimited number of teams, projects and workflow instances from the comfort of their desktop or the convenience of the web. Administrators can make absolutely sure that all requirements along the way are substantiated, completed within set timeframes and meticulously tracked. Since business practices change over time, modifications can be applied instantly, even to active processes already underway.

Detailed Reports

WorkFlow processes are individually audited and immediately reported. View and print workflow tasks in their entirety or at any point during the transaction. Information about active processes is compiled in live, continually updated status reports. Custom notifications alert supervisors of overdue or stalled documents, allowing them to reassign duties. Detailed reports help managers to identify bottlenecks and improve process efficiency.



Powerful Process Management

WorkFlow is an optional, affordable addition to PaperVision Enterprise or ImageSilo. Increase competitive advantage by electronically organizing, controlling and intelligently routing the documents that drive your organization. Designed as a fully integrated module, WorkFlow connects and distributes powerful functionality to all licensed users, eliminating the need for additional integration and installation. WorkFlow also leverages all the security, scalability, reliability and integration options of the ECM system to guarantee the integrity and availability of the data.

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

PaperVision® Enterprise WorkFlow



Technical Specifications

PaperVision Enterprise WorkFlow is an optional module of PaperVision® Enterprise or ImageSilo® that extends enterprise content management functionality to include automated document routing. Flexible licensing allows you to implement an unlimited number of workflows, to implement on a per workstep basis or to implement on a per user basis. WorkFlow is part of a suite of Enterprise Content Management products that also includes solutions for email management and COLD/ERM print stream processing.

System Overview

- Centralized administration console for all administrative, database and workflow functions is included
- Graphical design of workflow processes eliminates the need for any programming or scripting
- Workflows can be launched automatically based on administrator-defined conditions
- Evaluation rules specify which tasks must be completed for a workstep to transition
- Workflows can be edited, and changes are effective immediately—even on current workflow processes
- Administrators can quickly activate and deactivate workflow processes
- Workstep time restrictions ensure steps are completed in a specified time frame
- Worksteps waiting in queue allow users to see details such as document ID numbers and index values, giving them specific information about pending documents
- Workflow participants can take ownership of any workstep to complete the tasks in their work queues
- Workstep ownership can be changed manually by administrators or automatically (based on pre-defined conditions) to eliminate bottlenecks
- Automatic email notifications simplify process efficiency and maintenance
- Workflow tasks can include sending email messages with attachments or even links to other documents
- Worksteps can be cloned to streamline workflow setup
- Custom notifications can be sent to workflow participants or administrators based on specified conditions
- Status reports provide detailed information about current, active workflow processes to improve process efficiency and eliminate bottlenecks
- Users can view workflow status without administrative rights, enhancing productivity while maintaining security
- Detailed history reports contain completed workflow processes, worksteps and tasks for simplified auditing
- Reports can be archived, filtered and printed for review at a later time
- System adheres to provisions from the Workflow Management Coalition, ensuring continuity with emerging standards

- System works with Scan2PVE and Scan2ImageSilo to capture documents and upload them into a new or existing workflow process
- System works with PaperVision® Message Manager to leverage email and attachments to automatically launch workflow processes
- All upgrades are included with annual maintenance, ensuring access to the latest product features and benefits
- Complete, detailed online help includes step-by-step instructions to get you started quickly
- Toll free, legendary technical support is eager to assist with any questions you may have

Security

- This add-on product is fully protected and supported by the same security features and capabilities of PaperVision Enterprise or ImageSilo (see ImageSilo and PaperVision Enterprise product sheets for details)
- Simplified administration can be performed by specific users or general system administrators

Scalability and Reliability

- Flexible licensing allows you to deploy workflow functionality within a single department or across an entire enterprise
- Unlimited workflow participants can be defined based on existing PaperVision Enterprise or ImageSilo users and groups
- Simple user interface allows administrators to graphically define and edit multiple workflows with unlimited worksteps in seconds
- Unlimited tasks can be included in a single workstep to increase flexibility in workflow design
- Multiple servers and workstations can be load-balanced to ensure task efficiency even during busy times

PaperVision Enterprise WorkFlow Technical Specifications

Integration

- Extensive use of web services to support integration and cross-platform compatibility
- COM-based APIs support both local and remote communications without requiring modification to code
- ActiveX® (OCX) controls can be embedded into third-party applications
- Customizable source code is included for both browser-based and desktop client applications
- System supports the ability to launch line-of-business applications automatically at any point in the workflow process
- Integration with Microsoft® Office SharePoint® Server 2007 enables companies to leverage the PaperVision® Enterprise WorkFlow functionality directly within their SharePoint portal

WorkFlow Toolkit

The WorkFlow Toolkit is an optional, separately licensed component of PaperVision Enterprise WorkFlow that enhances integration and enables users to easily access WorkFlow controls from their line-of-business application. Benefits include:

- WorkFlow ActiveX controls offer developers an industry-standard programming interface and can be easily deployed with any application
- WorkFlow controls integrate directly with your line-of-business interface for easy and instant interaction
- Integrated access to the worksteps waiting in queue allows users to act on documents the moment they are ready
- Integrated access to the task list enables users to conveniently view and check-off tasks for each document
- Integrated access to current workstep ownership simplifies task prioritization and enhances productivity
- Included samples provide a simple, easy-to-follow examples for implementing WorkFlow controls within your line-of-business application

For a complete product listing and technical information, please visit www.digitechsystems.com or call toll free 866.374.3569.

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2. Who do we market to?

It is our experience that the lowest hanging fruit exists in our own client base. It makes so much sense to attack them first as you already have an established and positive business relationship.

They will provide you with the opportunity to get a little on-the-job training and become familiar with the front-end processes and the software, allowing you to learn from the school of hard knocks in a less threatening environment.

In addition to cutting our teeth on our existing client base, we also used ourselves as guinea pigs. Trust me, you learn more about your filing process and the bad habits you have fallen into when you are forced to prep, index and scan your own internal documents.

Now that you have approached your existing client base and are actively scanning your own documents it is time to take the show on the road. Where do you go and who do you talk to?

A. Target Identification

Again, I can only speak to our experience and our market but we have found the following to be true: Everyone is a potential imaging client.

The ability to sell “Any Document-Anywhere-Anytime”™ is a powerful tool. Add increased security and audit capabilities and you have a story to tell that people will not ignore.

Selling imaging to your existing clients is offering them a flexible alternative solution with a vendor they already trust with their information.

Approaching any new prospect regarding document imaging will typically get you in the door. It’s got more “ZING” to it than boxes, files, etc. Once in the door however you may recommend a solution that does not involve imaging at all.

That’s what we have found to be the single largest benefit to our stepping out into the “Service Bureau” imaging world. We can handle all of their information management needs, from soup to nuts, and we don’t have to lead them away from a solution they either need, want, or just makes good business sense for them.

A.Target Identification (Con't)

We can make the right recommendation for their situation and come out of there with a clear conscious and a signed contract.

So what does all this have to do with “Target Identification”? Its simple, target those prospects that won't talk to you about paper or tape. Now you have a more contemporary solution to offer.

Trust me, it's a powerful weapon to scan in a proposal, convert it to PDF and bookmark with typical tab headers. You then e-mail it to them explaining the attached proposal is also a demo of the retrieval, search, distribution and viewing power that is offered within your scanning solution.

They may not need or be ready to take the step into the document imaging world just yet, but I assure you they will feel better about storing their boxes with a vendor that can take them there when they are ready.

Finally, there are specific industries that do lend themselves to document imaging as a perfect solution. The following are some with brief explanations as to why:

- ✓ Medical – The ability to deliver medical information to the desktop in a completely HIPAA compliant manner is powerful.
- ✓ Service – to be able to retrieve “proof of delivery” and or “proof of service” while on the phone with a client is not only efficient it's a potential A/R dream.
- ✓ Insurance – The ability to merge scanned documents based on claim specific identification from multiple origins creates a compelling story.
- ✓ Legal – OCR capability allows for efficient discovery across multiple indexed directories. Also, we all know how impatient Lawyers can be, and the “Any Document-Anywhere-Anytime”™ is music to their ears.

Notice these are the same business types that we have all built our box “nest egg” selling to. Remember it is not a question of are they going to image documents. It is a question of whether or not they pay you or someone else.

B. Target Record Types

This is another area where starting with your own internal documents and/or learning the ropes with your existing client base will pay some huge dividends.

There are benefits in having any record, whether it is in electronic form or in paper form, stored electronically. There are also benefits to having certain types of records stored in CD form instead of storing them continuously in electronic form.

iChamber™, our storage network device, lends itself to those types of records that need to be accessed as follows:

- ✓ Frequently
- ✓ Simultaneously by various end-users
- ✓ Multi-geographic retrieval requirements
- ✓ As part of an approval process
- ✓ Need for continuous access audit trail
- ✓ Subsequent documents matched and merged with original
- ✓ Rapid retrieval with customer service and/or financial liability
- ✓ Engineering/CAD drawings that are large, and costly to reproduce and or distribute in a multi-copy format

CD output on the other hand has a different set of criteria:

- ✓ Limited retrieval activity
- ✓ Limited number of end-users needing access
- ✓ Static documents (i.e. reference manuals, historical info, etc.)
- ✓ Marketing material (i.e. pictures, brochures, power point presentations, etc.)
- ✓ Where internet access is either discouraged or prohibited
- ✓ When it is necessary to transfer images to an “Enterprise Solution” client
- ✓ Where the ongoing cost of *iChamber™* or other electronic storage is a concern to client.
- ✓ Archival / historical records

3. How to Market?

In the spring of 2000 we felt that we needed to get into the document imaging marketplace. We did our homework and discovered the initial investment was between \$100,000 and \$150,000.

We were not exactly sure what the market was for this type of service, which lead us to beat the bushes for solid and signed “Letters of Intent”. In other words we used the “If we build it, will you come?” method.

Our goal was to generate \$100,000 in committed business during our first year of operation. We had hoped to accomplish this in 3 months. While it took us 6 months, we learned a ton of valuable information along the way.

Maybe the most valuable lesson we learned was that no 2 imaging projects even come close to being alike. The initial survey and scope of work agreed to is absolutely critical. Each prospect’s expectations and level of understanding impact the initial survey and the final project. We also learned that sometimes you just have to walk away and be glad your competitor got that one.

There is no magic wand that we have found to market document imaging. It is no different than marketing any of your other service and storage offerings. The more people you talk to, the more people you get in front of, and the more times you ask for the business, the more business you get.

We have found imaging to be an easier door opener than our traditional service and storage offerings. People are always looking for ways to save money and run their operation more efficiently.

One of the staples of the box storage angle has always been to allow us to help them better utilize expensive office space. Document imaging will allow us to help them better utilize their office staff.

Think of the value of the A/R clerk being able to e-mail a copy of the infamous “lost invoice” while she is on the phone making her collections calls. “Now that we both agree you have the invoice in front of you, when do you think I might expect a check?”

Much more efficient than finding the original and either mailing or faxing for the 2nd or 3rd time.

I am sure you all know how to sell, so enough of the student trying to teach the teacher. This section contains some useful material we use to determine the original scope of the imaging project and some worksheets to assist you in walking a client through a cost justification of document imaging.

A. Client Survey Samples

We have used this version since 2000 and found it to be more than adequate. We have made some revisions since we now have the option of selling the resources that allow the client to do their own capture.



Note: All light blue or non-highlighted cells are protected.

Scope of Work Information:

x	iChamber™ Partner Company	ABC Records Management	Release 1005-9.2 (affinity3)
1	Prospect Company Name	The Perfect Client	Agreement # ----- N/A
2	Prospect Primary Contact Name	Primary Contact	
3	Sales Rep Name	Rep #1	
4	Sales Rep Contact Number	123-456-7890	
5	Date of proposal presentation	5/1/2010	Pricing expires in 45 days.
6	Is prospect doing business with us	Yes	
7	If yes to number 6 - List services they are using (HC,VLT,DEST,IMG,OTR)	HC	
8	If no to number 6 - List service potentials (HC,VLT,DEST,IMG,OTR)	N/A	
9	Total estimated number of pages to be captured for this document type	210,000	
10	Est. % of total pages that can be fed through ADF (Automatic Document Feeder)	100%	
11	Average age of documents	1 Yr	
12	General condition of documents- good 12a ---- Post scan reassembly required	No	(yes = complete restaple, etc.)
13	Desired turnaround time in months (ie. 2 wks = 0.5 mo's, 3 wks = 0.75 mo's)	1	(21 business days = 1.0 months)
14	Estimated number of courier stops to be charged per frequency (see #31 below)	1	
15	Image output to iChamber™ or to Client Network using Digitech enter "Yes"	Yes	("No" = "Yes" to #16 below)
16	Image output to CD/DVD or files to be exported to non-Digitech system	No	
17	Number of authorized users accessing images via iChamber™ or Client Network	3	(if #15 = "No" then enter "0")
18	Estimated level of monthly access activity via iChamber™	Moderate	
19	Are documents to be imaged and stored (Y or N)	No	
20	Are documents to be imaged and destroyed (Y or N)	Yes	If "Yes" after 120 days.
21	Number of index fields containing "alpha only" and/or "alpha/numeric"	1	
22	Number of index fields containing "numbers" only	1	
23	Number of index fields that are "Auto Capture" capable and/or full text OCR	0	Full Text OCR add "1"
24	% of documents that are Black and White	100%	
25	Can prospect supply a small sample for testing and demo capability?	Yes	
26	What is the Record Title	Document Title	
27	List output type (iChamber™, CD/DVD w/ Security Copy, File Transfer)	iChamber™ Solution	
28	% of documents that are Letter Size	100%	
29	% of documents that are Simplex	100%	
30	What is the # of images captured per set of index fields (round to nearest whole #)	30	*No fractions allowed
31	What is the frequency of the proposed quantity (project, annual, monthly, etc.)	project	
32	List up to 5 lines of free text comments in 32a highlighted section below:		

33 - Index Header Value:

32a	This is where you can enter up to 425 characters of free form comments.	Index Field Header Title #1	-----1
		Index Field Header Title #2	-----2
	If you have no comments please delete these fields.	etc	-----3
		etc	-----4
		etc	-----5
	If you do not delete them then the client will see them.	etc	-----6

At a Glance

Serv	Serv	Months	Break Even	Cont. \$\$\$
	\$0.0900	1.00	\$0.0584	\$6,641
Serv	Front	Back	Enter	Cont. %%
Total \$\$\$	\$0.0954	\$0.0921	\$0.0902	35.14%
\$18,898				

Legend for DataChambers Records Management Imaging Scope of Work Information:

- 1) Prospect Company Name
- 2) Prospect primary contact name
- 3) Name of selling representative from your company
- 4) Telephone number of selling representative from your company
- 5) Date proposal is to be presented and/or completed (also key in number of days you are willing to honor pricing as presented)
5a) Sets an effective date for proposed pricing
- 6) We included this to allow for either real or perceived discounts options for us
- 7) Clarifies what other types of business we are doing with them but more importantly, offers us a chance to chat about our other service and storage options if they are unaware of them.
- 8) Opportunity to discuss who the players are for the different business departments
- 9) This is the total number of images that we are bidding on for this project. We include any backlog of data and future images for the 1st 12 months of processing.
- 10) This deals with “lift and place” documents. This will not be with every project and is actually rare but it has an incredible impact and can kill your margins if not accounted for. If you run into heavy lift and place you will need to give myself or Fred a call on the first couple of projects.
- 11) This will assist greatly in setting the table for one of the most costly pieces of the project – the document preparation. You want to lead them down a path where “you have experts that make their ugly stuff as clean as a whistle”.
- 12) This will set the time allocated to prep for this project. The better shape the documents are in the faster they will prep. The choices are as follows. (poor, fair, good, and excellent) Each carries a default number of prep pages per hour. When you click on the cell in the actual program you can see how many pages / hour are associated with each condition.
12a) This allows for those projects where a full reassembly is required. Full reassembly is defined as returning the scanned documents to as close to their original state as possible. (Staples, clips, etc.) Answering “yes” here will have a dramatic impact on the prep time. The default set in the program will add 75% to the prep time but it is a field that can be adjusted by the user.
- 13) Enter the desired turnaround time in months. Be sure you do not allow them to force you into a panic situation by agreeing to unreasonable delivery timeframes. Do not spoil them. You are the expert and it takes some time to get it right.
- 14) This allows you the option to charge for courier services to accommodate the proposed project. Simply enter the number of trips that will be necessary to secure the number of documents being scanned during the project “frequency” as selected in #31.

Legend (Con't)

- 15) Place a 1 in the box if their desired method of image delivery is *iChamber™* (web accessible).
- 16) Place a 1 in the box if they prefer CD burn and/or file transfers. We make it common practice to burn a security copy and store the second copy in our vault.
- 17) This will give an indication of how many license seats need to be purchased in order to ensure dependable access to the end-users. The typical ratio is 1 seat for every 3 potential users.
- 18) This will allow you to further decide how many copies of PVE to purchase.
- 19) This will allow you to discuss the disposition of the paper records once the project is complete. It will be up to you whether or not you begin to immediately charge for hardcopy storage or you may choose to give 3 months of free storage prior to charging them to destroy the records.
- 20) If documents are to be destroyed be sure you agree upon a timeframe for them to be stored prior to destruction.
20a) We suggest 60 to 90 days to allow for some pretty good QC and validation by the client.
- 21) This is an area that you should spend ample time to ensure that you understand exactly how they retrieve the records and how they expect the indexes to appear. This is also one of the main reasons to request that you be able to present them with a sample scan of project documents. It will ensure that your initial scope of work is consistent with their expectations. We consider any string of characters with even 1 alpha to be "alpha".
- 22) "Numeric only" should truly be numbers only.
- 23) Auto capture can save them quite a bit of money on data entry but be sure you have tested a sample before you set a fixed price for the project.
- 24) Typically black and white will be the capture of choice. However if you do encounter some color scan needs it is important to remember that it will impact capture time, and due to the increased image size it also impacts retrieval. The impact it has on retrieval may also impact your indexing throughput, as it takes longer to bring each document to the screen for data entry.
- 25) Just a reminder to ask for the all important sample. It allows you to show them just how the end product will look and as stated before forces discussion and agreement on the final scope of work.
- 26) Enter a record type to be able to communicate any differences that exist between document types in a multi type quotation. For example, you may need to index 4 alpha numeric fields on a duplex document such as "A/R Invoices" and only need to index 2 numeric fields on a simplex document such as "POD's – (Proof of Delivery)".
- 27) List the desired Output method for delivery of images (iChamber™, CD, File Transfer, etc.)

Legend (Con't)

- 28) Enter the % of documents that are letter size documents.
- 29) Enter the % of documents that are simplex (single sided) documents.
- 30) The most important number on this sheet. Enter the ratio of images to each index. A ratio of 4 to 1 would mean that for every 4 images that you capture you will be indexing one document.
- 31) Enter the frequency with which the proposed amount of documents will be imaged. (ie. project, monthly, annually)
- 32) Free form entry of important comments that impact the project in any way.
- 33) List the index value headers for the number of index fields mentioned in #21 and #22 above.

There are several of the fields that utilize a drop down box that will drive you to specific formats in your answers.

As always if you have any issues with the form, please give us a call.

B. Cost Justification Worksheets:

The following spreadsheet is included as an example of a tool that can be developed to help walk a prospect through the process of the potential savings that can be realized from scanning.

You will notice as you glance through the spreadsheet that it can also assist you in your dealings with prospective clients that are not currently storing their boxes with you.

In these “New Opportunity” situations you can offer the best of both worlds to your prospect, hardcopy storage or document imaging.

The use of this worksheet may not be necessary in every situation. It will assist you in demonstrating the economics of the process and at a minimum provoke some thought as to their existing cost of handling their information.

Cost Justification Analysis

Current Cost

Modify only shaded areas

Space:

Location	Sq. Ft. Occupied		\$ / Sq. Ft.		Space Cost
On-Site	225	X	\$15.00	=	\$3,375
Offsite - Warehouse	0	X	\$9.00	=	\$0
Offsite - Mini Warehouse	100	X	\$7.80	=	\$780
Offsite - Records Center	0	X	\$2.00	=	\$0
Total Annual Space Cost					<u><u>\$4,155</u></u>

Labor:

Staff Member	Hrly Rate		Load Rate		Wkly Hrs		Labor Cost
			25%				
File Clerk	\$10.00	+	\$12.50		8	X 50 weeks =	\$5,000
Administrative	\$12.00	+	\$15.00		2	X 50 weeks =	\$1,500
Management	\$20.00	+	\$25.00		1	X 50 weeks =	\$1,250
Other		+	\$0.00			X 50 weeks =	\$0
Total Annual Labor Cost							<u><u>\$7,750</u></u>

Off-site Services:

Location		Monthly Cost				Service Cost
Warehouse Service Charges		\$0	X	12	=	\$0
Mini-Whse Service labor (your staff)		\$100	X	12	=	\$1,200
Records Center Service Charges		\$0	X	12	=	\$0
Total Annual 3rd Party Service Cost						<u><u>\$1,200</u></u>

Lost and/or Misfile Cost:

Total number of documents		<u>432000</u>		Cost of Action		
% of misfiles	0.125%	540	X	\$30	=	\$16,200
% of lost	0.075%	324	X	\$100	=	\$32,400
Total Annual Cost of Lost / Misfiles						<u><u>\$48,600</u></u>

Miscellaneous Cost:

Equipment (filing cabinets, etc.)		\$0
Supplies (folders, clips, staples, etc.)		\$0
Copier Maint.		\$0
Copier Paper		\$0
Copier Toner		\$0
Other		\$0
Total Annual Cost of Miscellaneous Items:		<u><u>\$0</u></u>
Total Current Cost (Annual)		\$61,705
Total Current Cost per Document		\$0.14

4. How do we price it?

In this section you will find tools that we have found to be quite helpful. They include the following:

- A. Sample Proposal and Pricing Worksheet
- B. A spreadsheet to analyze the processing labor costs associated with operating a service bureau solution for Document Imaging
- C. Sample “Service Bureau Agreement”

A. Proposal and Pricing Worksheet Samples:

The information gathered during the client survey mentioned in 3A will be used to fill in the “Scope” portion of the initial proposal. This information will populate necessary fields throughout the proposal and provide you with either a final draft proposal or a tool to assist you in preparing a proposal in your own format.

The “Pricing Sheet” section allows you to enter the desired rates for proposal preparation. We have ours set to our desired “retail” rates but if needed we can alter these rates depending on volume, competitive climate, etc.

This “Project Planner” tab contains the following sections and are not made available to the client for obvious reasons, but are maintained with our office control copy for reference.

- ❖ Projected Business Analysis – This section is a combination of the “Project Summary” section and the “Production” section. It also outlines manpower needs and margin calculation.
- ❖ Storage – This section calculates storage revenue accumulation assuming that project will continue on a regular basis.

The sections that are included in our Proposal package are as follow;

- ❖ Cover Sheet –
- ❖ Advantages – We simply list some advantages of Document Imaging in anticipation of the proposal being passed on to potential influencers that we have not had the opportunity to be in front of.
- ❖ Info Recap - This is the client survey form that we are currently using. We feel it is imperative to recap the “scope of work” and clearly define the project objectives and we have found this format to do a good job of that. It is also a form that they originally assisted us in filling out.

How do we price it? (con't)

- ❖ Schedule “A” – This is where we itemize the transactional pricing for the individual components of the project.
- ❖ Solution Summary – This is a snapshot of all related cost to the proposed project that outlines all associated cost including set-up fees and any ongoing *iChamber™* cost. It also contains a section that allows them to sign in acceptance of the proposal.

Note: We have had a considerable amount of our success with our existing client base and have found it convenient to utilize this acceptance section as an agreement instead of going for a separate “Service and Storage” agreement designed specifically for the project.

We have modified the “Services/Storage” section of our “Service and Storage Agreement” to accommodate Document Imaging when requested or if the prospect is not currently under contract with us.

In addition, we have found it useful to present them with a “Service Bureau Agreement” which is a simpler format to adjust if the scope of the project is altered prior to acceptance of the proposal.

You will see that we have included in numerous places some language that the proposal is “based on estimates and actual throughput will be charged.”

The sample proposal included in this package represents a one month project that would require one (1) scanner running at capacity for one shift at current retail rates.

Included behind the proposal are the sections of the “Proposal Spreadsheet” that we do not share with the client. (noted above)

B. Projected Business Analysis:

This spreadsheet is a part of the overall proposal spreadsheet and is a great tool not only for individual project analysis but also for the overall analysis of your document imaging department.

It allows for entry of all variable and fixed cost that you may chose to allocate to a project or to the department in total. It also will assist in determining labor needs for the different areas. (prep, scanning, indexing, etc.)

How do we price it? (con't)

The sample included in this manual represents a typical month. Typical being defined in the following manner:

- Production days = 21
- Image throughput daily = 10,000
- Base hourly pay rate = \$12.50

How do we price it? (con't)

- Dedicated department manager = \$61,344 (we allocate 15% of a manager who oversees the process.
- Assumes 30 images per required entry of index fields
- Assumes only 800 indexes entered per day
- Assumes 1 alpha numeric and 1 numeric only index fields
- Assumes prep rate of 600 per hour
- Assumes all output is *iChamber™* w/ no CD burn expense

As you can see the total hourly employee's necessary to operate at capacity is just over 3. That equates to a direct labor contribution margin of over 70%, which is how we measure our weekly productivity. Remember however, you must account for employee taxes and benefits at some point. It is up to you to determine how much of your overall variable expenses and overhead to apply to this endeavor in order to analyze in a method that is consistent with your current measures of your existing profit centers.

C. Service Bureau Agreement:

A copy of our simple "Service Bureau Agreement" that allows us to quickly alter the original scope of work on the fly without processing an entire new proposal (unless necessary) or without entering into an additional "Services Agreement" with a client that is already under contract for other services with us.

Sample Proposal

ABC Records Management

Presents

An Imaging Solution

To:

Primary Contact

The Perfect Client

Document Title
iChamber™ Solution

Service Agreement #

N/A

1-May-10

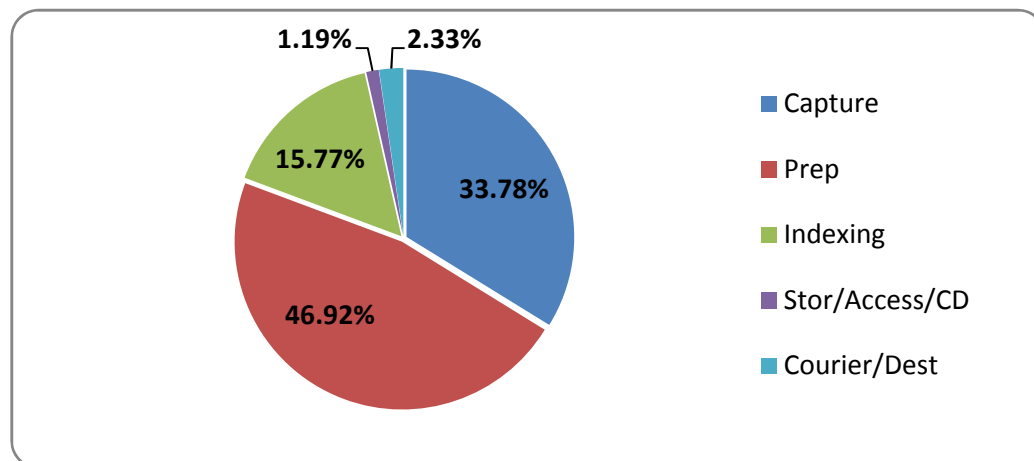
Prepared by:

Rep #1

123-456-7890

Imaging Solution Charge Summary:

5/1/2010



Document Preparation	\$8,750
Document Capture	\$6,300
Document Indexing	\$2,940
Total Processing Estimated Cost	<u>\$17,990</u>
Total Estimated Cost per Image	<u>\$0.0857</u>

Estimated Initial Set-up Fee	\$250
Estimated CD/DVD or File Transfer Fee	\$0.00
Estimated Monthly Access Management and Storage Fee	\$222.66

The Perfect Client

Doc Title: - Document Title

Est. # of Images ----- 210,000

Project Frequency --- project

Total Index Fields ----- 2
(Data Entry Required)

Desired completion (in months) -- 1

Proposed completion (in months) - 1.36

Number of Authorized Users - 3

GIG generated per project ----- 8.20

ABC Records Management

- Image Integrity

- Dependable Delivery

-Competitive Cost

Note: For detailed explanation of estimated charges please refer to Project Pricing portion of this proposal.

The Advantages of Document Imaging:

- * *Improves personnel productivity*
- * *Reallocation of personnel and / or personnel reduction*
- * *Quality control and work flow improvement*
- * *Eliminate or reduce misfiling and document loss*
- * *Eliminate or reduce paper and copying*
- * *Storage space and storage cost reduction*
- * *Improved customer service*
- * *Faster response due to quicker retrieval*
- * *"Chain of Custody" management and reporting*
- * *Multiple index field capability*
- * *24 hours access - 365 days a year*
- * *Document security*
- * *Liability reduction*
- * *Concurrent user access with powerful search capability*
- * *Improved space utilization*

Document imaging is an efficient electronic document management system. Imaging provides organizations with the ability to capture, store, archive, and retrieve document images.

Document imaging allows your business to define the routing of a document, therefore automating the business document flow process.

ABC Records Management

Agreement # - N/A

Pricing - Exhibit A - (pg. 1 of 2)

The Perfect Client

5/1/2010

Complete Scanning Solution Pricing Table:

Document Title
iChamber™ Solution

Scope of Work:

* Total scanned images /	project	-----	210,000
* Number of index fields required		-----	2
* Anticipated image retrieval level		-----	Moderate

Schedule of Rates:

Imaging:

	<u>Type</u>	<u>Size</u>	
*Per image scan charge	(Simp/Dup	Ltr)	-----
			\$0.0300 per img.

Indexing:

* Per Document - Alpha-Numeric fields	-----	\$0.250	per index field
* Per Document - Numeric only fields	-----	\$0.170	per index field
* Per Document - Auto Index / Full Text OCR	-----	\$0.0300	per index field

File Transfer to Client Network or CD Burn (2 copies): ----- \$35.00 per set

CD/DVD Security Copy Vault Storage ----- \$15.00 per container/month

Document Preparation:

* Estimated cost per document	----- 0.04167 -----	\$25.00	per Hour
* Assumes documents are in	<u>good</u> condition		
* Avg. pgs. to prep / hr (adjusted for reassembly and small doc size)	---	600	
* Actual prep hours will be billed			

Confidential and Proprietary

ABC Records Management

Agreement # - N/A

Pricing - Exhibit A - (pg. 2 of 2)

The Perfect Client

5/1/2010

Service Bureau Pricing Table

Document Title
iChamber™ Solution

iChamber™ (Electronic Retention and Retrieval Service) - - - - - \$25.00 *Monthly Storage Minimum*

* *Estimated cost per image based on* - - - - - \$0.01758 *per Megabyte per Month*

Simplex 8 1/2 X 11 = \$0.0011

Average imgs / mb = 25

Courier/Destruction:

* *Courier charge per stop* - - - - - \$15.00 *Per Courier Service*

* *Destruction Charge per container/cube* - - - - - \$5.00 *Per Container/Cube*

System Administration:

* *Initial Setup (One Time Fee - Service Bureau Clients)* - - - - - \$250 *(Initial Project only)*

* *Initial Setup - Software Training (One Time Fee - Front End)* - - - - - \$1,520 *(Initial Project only)*

* *Initial Setup - Includes Training (One Time Fee - Back End)* - - - - - \$4,280 *(Initial Project only)*

* *Initial Setup (One Time Fee - Enterprise Clients)* - - - - - \$4,280 *(Initial Project only)*

* *User Access to iChamber™ (Charged monthly)* - - - - - \$25 *(Per authorized user)*

* *Initial Setup (One Time Fee - CD/DVD Burn or File Transfers)* - - - - - \$125 *(Initial Charge only)*

* *System Security Maintenance (1/4 Hr. Minimum)* - - - - - \$45 *(Per Hour)*

* *Customized Projects* - - - - - \$45 *(Per Hour)*

Included in the Pricing Structure: - - - - - *No Charge*

* *System Configuration and Software Installation - (if necessary)*

* *Software and Hardware Support - (for Service Bureau option only)*

* *License Fees*

Confidential and Proprietary

ABC Records Management

1-May-10

presents

a Complete Service Bureau Imaging Solution Prepared for

The Perfect Client

The following proposed pricing is for us to provide you with complete Imaging Service Bureau processing, to include document preparation, document scanning, document indexing and either iChamber™ storage and access, file transfers or CD / DVD burns.

Following assumes average project throughput of approximately 210,000 manually scanned pages.

Project Details/Scope of Work

This proposal is specifically prepared for the following document type -----	Document Title
Desired frequency of project (i.e. daily, weekly, monthly, quarterly, one-time project)- - - - -	project
Percentage of originals of this document type that are b&w- <u>100%</u> % duplex- - -	0%
Number of images to be captured (image throughput listed adjusted for % duplex above) - - -	210,000
Estimated percentage of documents that can be captured via automatic document feeder- -	100%
Estimated average age of documents to be captured - - - - -	1 Yr
General condition of documents to be scanned (i.e. poor, fair, good, excellent) - - - - -	good
Will complete post scan reassembly be required (this will greatly increase prep hrs)- - - - -	No
Desired method of image output (iChamber™, CD/DVD, FTP) - - - - - (if iChamber™ (secure web repository) # of anticipated authorized users)- - - - -	iChamber™ Solution 3
Desired disposition of original documents at project completion (i.e. store, destroy, return)- -	Destroy
Desired project turnaround in months (i.e. 2 weeks = .5 months, 6 weeks = 1.5 months)- - -	1
Number of courier services to be allocated and charged to this project- - - - -	1
Number of boxes to be destroyed post capture and following <u>120</u> day QC period-	84
Agreement # - - - - N/A	Project Pricing - (pg. 1 of 3)

Project Comments Specific to this Proposal:

This is where you can enter up to 425 characters of free form comments.

If you have no comments please delete these fields.

If you do not delete them then the client will see them.

Additional Project Notes:

Estimated prep hours are based on our ability to prep the following number of pages per hour- - - 600

Prep may be negatively impacted by two factors:

- 1. Small document size which increases the amount of lead sheets inserted to originals prior to capture*
- 2. Original document reassembly. Without reassembly the documents are returned to their original box, in their original order but we do not re-staple or re-clip them back to their original form.*

Project originals fall into one or both of the above categories and will increase the amount of prep required No

We will maintain a copy of scanned image output for 30 days, in order to provide client an opportunity to validate transfer of images to repository

All throughput numbers are estimates based on information provided by the client and/or initial site survey

While actual throughput numbers will be invoiced, we pride ourselves on the accuracy of our estimates

Once we have started the project should we see that actual and proposed estimates vary significantly in either direction, we will place project on hold until we have contacted you to discuss pricing impact.

The requested indexing fields are as follows:

<u>Index Field Header Title #1</u>	<u>etc</u>	Alpha/Numeric--	1	Numeric--	1	Auto --	0
<u>Index Field Header Title #2</u>	<u>etc</u>						
<u>etc</u>	<u>etc</u>						

Estimated timeframe to complete proposed project during normal business hours- - -

1.36 month/s

5.72 week/s

Minimum time frame for completion of any proposed project is 3 days.

28.60 days

Actual throughput numbers will be invoiced.

Proposed pricing for this imaging solution will remain in effect until- - - - - 06/15/10

Agreement # - - - - - N/A

Project Pricing - (pg. 2 of 3)

Estimated Cost per ----- project	\$	%	Rate / Per	Unit
Preparation / Reassembly *(Charged by the labor hour)	\$8,750.00	47.49%	\$0.042 /	image
Indexing, Auto Index or OCR* * (Charged per index)	\$2,940.00	15.96%	\$0.420 /	document
Imaging (Charged by the image)	\$6,300.00	34.19%	\$0.030 /	image
Courier and Destruction Services	\$435.00	2.36%	project /	project

Total Production Cost: (does not include any set-up fees) \$18,425.00

Average Cost Per Image: \$0.088 (does not include image output options or any applicable initial project set-up)

<u>Additional Image Output and Delivery Charges That Will Apply:</u>		<u>Rate / Per</u>	<u>Unit</u>
CD / DVD Security Copy Vault Storage - Monthly	\$0.00	\$15.00 /	Container
CD/DVD Burn or Image Transfer to Client Network	\$0.00	\$35.00 /	CD/DVD Burn/FTP
iChamber™ access and user management fee (Charged Monthly)	\$75.00	\$25.00 /	Authorized User
Estimated Electronic Retention & Retrieval: (iChamber™)	<u>\$147.66</u> *	\$18.00 /	Gig of Stored Img's
Total Estimated Additional Charges	<u><u>\$222.66</u></u>		

* Storage will increase aprox. \$147.66 per project frequency. (Monthly minimum iChamber™ charge = \$25.00)

* iChamber storage will grow 8.20 gigs per project frequency. (We estimate 25,000 images / gig)

Initial Client Setup - (Includes the following) \$250 One time fee
 User Access Setup and / or CD Burn formatting
 Client Functionality Configuration
 Initial Testing and Approval Process

Total Per Image Cost (Incl's Prep, Scan, Index, Initial Setup, & Additional Output & Delivery Charges Listed Above) --- \$0.090

Total Initial Project Charge -- \$18,898

ABC Records Management

Service Bureau Agreement

The following outlines the services and related charges for - - - - - iChamber™ Solution services to be provided
(Type of service)
for - The Perfect Client and authorized by ----- Primary Contact
(Company Name) (Company Contact)

General Information:	Client P.O. #	Service Agreement #	N/A
-----------------------------	----------------------	----------------------------	------------

(see attached proposal for addl project related specifications)

Charges:

	<u>\$/unit</u>	<u>est. qty.</u>	<u>est. tot. \$</u>
Document Prep	\$25.00 / hr	350.00	\$8,750.00
Indexing - Data Entry	\$0.42 / file	7,000	\$2,940.00
Document Scanning	\$0.0300 / img	210,000	\$6,300.00
Courier and Destruction Services	\$0.00207 / img	210,000	\$435.00
CD/DVD-Copy Vault Storage (monthly)	\$15.00 / cont	0	\$0.00
Initial Set-up Fee (one-time charge)	\$250.00 / proj	1	\$250.00
iChamber™ Access/User Mgt Fee (monthly)	\$25.00 / user	3	\$75.00
Est Elec Retention & Retrieval: (iChamber™)	\$0.0176 / mb	8,400	\$147.66
CD/DVD Burn-FTP Transfer to Client	\$35.000 / set	0	\$0.00
Total Estimated Charges			\$18,897.66

Note: These are estimated charges based on the information provided (see attached). Actual quantities will be billed.

The above service is to begin on _____ per above contacts signature below.

The above service is to completed by _____ provided scope of work is not modified.

This proposal is presented by ----- Rep #1 an authorized representative of ABC.

Project Name: Document Title

Agreed to by: _____ Date : ____/____/____
(Authorized Company Representative)

Title: _____ This project is to be billed to client # ---
(Contact Title)

Sample In-house portions of
Proposal worksheet



Note: All light blue or non-highlighted cells are protected.

Scope of Work Information:

x	iChamber™ Partner Company	ABC Records Management	Release 1005-9.2 (affinity3)
1	Prospect Company Name	The Perfect Client	Agreement # ----- N/A
2	Prospect Primary Contact Name	Primary Contact	
3	Sales Rep Name	Rep #1	
4	Sales Rep Contact Number	123-456-7890	
5	Date of proposal presentation	5/1/2010	Pricing expires in 45 days.
6	Is prospect doing business with us	Yes	
7	If yes to number 6 - List services they are using (HC,VLT,DEST,IMG,OTR)	HC	
8	If no to number 6 - List service potentials (HC,VLT,DEST,IMG,OTR)	N/A	
9	Total estimated number of pages to be captured for this document type	210,000	
10	Est. % of total pages that can be fed through ADF (Automatic Document Feeder)	100%	
11	Average age of documents	1 Yr	
12	General condition of documents- good 12a ---- Post scan reassembly required	No	(yes = complete restaple, etc.)
13	Desired turnaround time in months (ie. 2 wks = 0.5 mo's, 3 wks = 0.75 mo's)	1	(21 business days = 1.0 months)
14	Estimated number of courier stops to be charged per frequency (see #31 below)	1	
15	Image output to iChamber™ or to Client Network using Digitech enter "Yes"	Yes	("No" = "Yes" to #16 below)
16	Image output to CD/DVD or files to be exported to non-Digitech system	No	
17	Number of authorized users accessing images via iChamber™ or Client Network	3	(if #15 = "No" then enter "0")
18	Estimated level of monthly access activity via iChamber™	Moderate	
19	Are documents to be imaged and stored (Y or N)	No	
20	Are documents to be imaged and destroyed (Y or N)	Yes	If "Yes" after 120 days.
21	Number of index fields containing "alpha only" and/or "alpha/numeric"	1	
22	Number of index fields containing "numbers" only	1	
23	Number of index fields that are "Auto Capture" capable and/or full text OCR	0	Full Text OCR add "1"
24	% of documents that are Black and White	100%	
25	Can prospect supply a small sample for testing and demo capability?	Yes	
26	What is the Record Title	Document Title	
27	List output type (iChamber™, CD/DVD w/ Security Copy, File Transfer)	iChamber™ Solution	
28	% of documents that are Letter Size	100%	
29	% of documents that are Simplex	100%	
30	What is the # of images captured per set of index fields (round to nearest whole #)	30	*No fractions allowed
31	What is the frequency of the proposed quantity (project, annual, monthly, etc.)	project	
32	List up to 5 lines of free text comments in 32a highlighted section below:		

33 - Index Header Value:

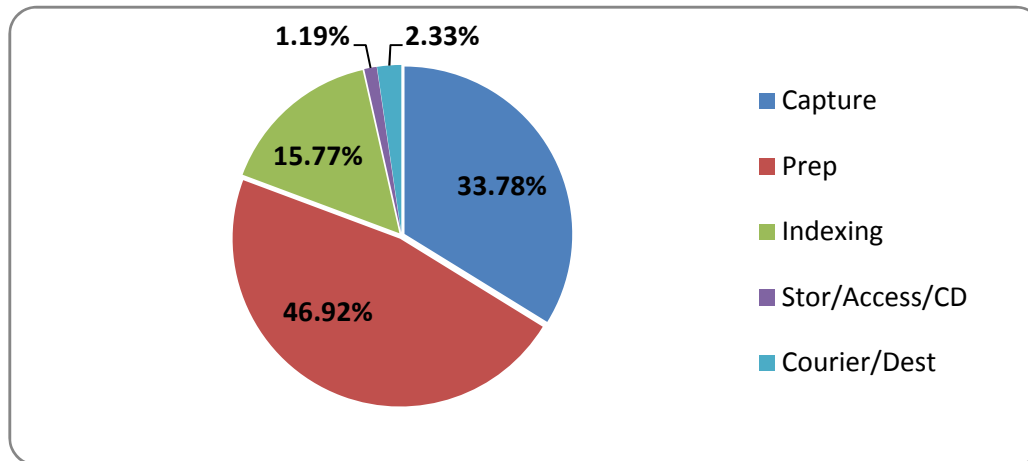
32a	This is where you can enter up to 425 characters of free form comments.	Index Field Header Title #1	-----1
		Index Field Header Title #2	-----2
	If you have no comments please delete these fields.	etc	-----3
		etc	-----4
		etc	-----5
	If you do not delete them then the client will see them.	etc	-----6

At a Glance

Serv	Serv	Months	Break Even	Cont. \$\$\$
	\$0.0900	1.00	\$0.0584	\$6,641
Serv	Front	Back	Enter	Cont. %%
Total \$\$\$	\$0.0954	\$0.0921	\$0.0902	35.14%
\$18,898				

Imaging Solution Charge Summary:

5/1/2010



Document Preparation	\$8,750
Document Capture	\$6,300
Document Indexing	\$2,940
Total Processing Estimated Cost	<u>\$17,990</u>
Total Estimated Cost per Image	<u>\$0.0857</u>

Estimated Initial Set-up Fee	\$250
Estimated CD/DVD or File Transfer Fee	\$0.00
Estimated Monthly Access Management and Storage Fee	\$222.66

The Perfect Client

Doc Title: - Document Title

Est. # of Images ----- 210,000

Project Frequency --- project

Total Index Fields ----- 2
(Data Entry Required)

Desired completion (in months) -- 1

Proposed completion (in months) - 1.36

Number of Authorized Users - 3

GIG generated per project ----- 8.20

ABC Records Management

- **Image Integrity**

- **Dependable Delivery**

- **Competitive Cost**

Note: For detailed explanation of estimated charges please refer to Project Pricing portion of this proposal.

Pricing Sheet

Date of Client Presentation- 5/1/2010

All cells protected except yellow highlighted cells - call DataChambers if you need to edit a protected cell.

Document Capture:		iChamber™ / Storage:		** (Discount applies)	At a Glance
Retail Per Image Scan Rate	\$0.0300	(scan,iCham only)	Retail rate for iChamber™ / gig / month	\$18.00	Serv Total \$\$\$ \$18,898
Discount offered (%)	0.00%		Retail rate for iChamber™ / meg / month	\$0.0176	
Discounted/Image Scan Rate	\$0.0300		DCRM Charge per gig / month	\$7.75	
Average scanner throughput per shift - letter	10000		gig transferred to iChamber™ per project	8.20	Serv \$0.0900 Months 1.00
Average cost per image captured	0.020		Images per meg	25.00	
Adjusted throughput for doc size & ADF %	10000		Meg transferred to iChamber™ per project	8400	
Scanner throughput adjusted for ADF %	10000	**iChamber™ Charge / meg		\$0.0176	Break Even \$0.0584 Cont. \$\$\$ \$6,641
Document Prep:		Charge from DCRM / meg / mo		\$0.0076	
Prep docs Labor Rate	\$25.00	**Est. Stor added to iChamber™ / project		\$147.66	
Prep docs per hour average	600	**Est. Monthly Stor charge per img		\$0.0007	Cont. %%
Prep Reassembly Multiplier	1.75	iChamber™ Access/ User Mgt Chg/Mo/User		\$25.00	
Reassembly Factor	1.00	Minimum Monthly iChamber™ Storage Chg		\$25.00	
Small Doc / Heavy Lead Sheet Insert Factor	1.00	User to Licensee Ratio Used		33%	35.14%
Document Indexing:		CD / DVD and/or File Transfer:			
Indexing Alpha	\$0.250	CD/DVD Set/File Transfer charge per		\$35.00	Front \$0.0954 Back \$0.0921
Indexing Numeric	\$0.170	Number of imgs per CD/DVD/File Transfer		8,000	
Auto Index/Full Text OCR	\$0.0300	# of CD/DVD's/File Trans. needed		0.00	
Average indexes per index employee per shift	1800	Image Transfer to Client per Transfer		\$35.00	Enter \$0.0902
Average cost per index	0.111	Image Transfer Frequency(# of Imgs)		8,000	
Labor Miscellaneous:		Number of CD sets or file transfers		0	
Average Base Labor Rate	\$15.00	CD/DVD Copy Mthly Vlt Storage Chg		\$15.00	
Labor rate loaded	\$19.20	CD/DVD Cap of container in vault		25	
Benefit Load Rate	28%	Number of Vault Stg Cont's Required		0	
Admin Labor Charge	\$30.00	Rounded number of Vlt Cont's req'd		0	Additional Services Provided:
IT Consulting Fee	\$45.00	Courier charge per trip		\$15.00	
Avg loaded hourly rate-prospect's employees	\$25.00	Destruction charge per cube or box		\$5.00	
Avg daily cost per prospect's imaging employee	200	Initial Set-Up Charges:			Service Bureau Clients \$250.00 CD/DVD Burn / File Trans \$125.00
Client IT internal support staff hourly cost	\$30.00				
Number of hours per month of internal support	12				

Project Miscellaneous:		Est Project Lgth	
Quantity reflects requirement to complete in	1.00	month/s	Proj Completion Multiplier = 1.25
Quantity reflects requirements to complete in	1	shift/s	Avg # of pgs per box/cube 2500
		Days 28.60	

Software and Hardware Sales Price		Exact	Rounded	Our Cost	Our Cost	Support	
	Mark-up %	Qty	Qty	Total	Each	Our Cost ea	Invoice Each
Scanner-(fi-6770)	10%	1.00	1	\$6,700	\$6,700		
Workstation/Card/Cable	10%	1.00	1	\$1,303	\$1,303		
PaperFlow Pro	10%	1.00	1	\$6,200	\$6,200	\$1,118	\$1,230
Papervision Enterprise	10%	0.99	1	\$850	\$850	\$157	\$173
Papervision Dist Asst	10%	1.00	1	\$550	\$550	\$110	\$121
Install/Config/Training / Hr	15%	1.00	1	\$100	\$100	Training / Hour	Config Rate
Scanner Maint from mfg	0%	1.00	1	\$1,650	\$1,650	\$100.00	\$600.00
				\$18,928		Travel Expenses Not Incl.	

Total system cost (less scanner maint) for depreciation

\$15,703	\$15,703	\$1,275	\$1,403
\$8,003	\$8,003		
\$7,600	\$7,600		
\$1,403			

Total Hardware -----

Total Software -----

Total Annual Support -----

Document Title
iChamber™ Solution
ABC Records Management



ABC Records Management
Projected Business Analysis



Document Title

iChamber™ Solution

Prepared for:
The Perfect Client

All cells protected except yellow highlighted cells - call DataChambers if you need to edit a protected cell.

Date of Client Presentation- 5/1/2010

Following assumes project completion of aprox. **210,000** completed in **1.00** months. Adjusted to **1.09** months for employee capacity.
Following assumes dedicating **1.0** scanner/s for **1** shift/s = monthly cap. of **210000** total images per month.

Requested months for completion of this project = **1**

Revenue:

46.30% Prep / Reassembly	\$8,750			Rate/	per				
15.56% Indexing	\$2,940	# of imgs/indx	30	\$0.0417	img	(Will bill at	\$25.00	per hour)	
0.78% Storage - one month	\$148			\$0.4200	indx	(Billed per index - alpha-	\$0.25	numeric-	\$0.17)
33.34% Imaging	\$6,300			\$0.0007	img			(Auto ndx/Full OCR-	\$0.03)
1.32% Set-up/Sys Admin	\$250	# of hrs =	0	\$0.0300	img				
2.30% Courier/Destruction	\$435	Courier \$\$\$	\$15.00	\$45.00	hr				
0.40% iCham/Burn/File Trans	\$75	total CD's/Trans	0.00	----- Dest \$\$\$	\$420.00				
Total Project Revenue:	\$18,898	(set-up not incl)	\$0.090	\$35.00	per set of 2 CD's or per file transfer				
Total Monthly Revenue:	\$18,898			= avg cost per image					

Variable Cost:

	Monthly Exp	Total Proj Exp
70.15% Wages	\$7,560	\$8,237
19.64% Loading	\$2,117	\$2,306
0.00% Misc Expense	\$0	\$0
0.00% Comp Supply	\$0	\$0
9.66% Sales Commission	\$1,134	\$1,134
0.00% Office Supplies	\$0	\$0
0.55% iChamber™ Storage **	\$60	\$65

Total Variable Cost:

\$10,870	\$11,742
----------	----------

Fixed Cost:

0.00% Overhead Allocation	\$0	\$0
0.00% Rent	\$0	\$0
0.00% Utilities	\$0	\$0
0.00% Support and Maint.	\$0	\$0
100.00% Deprec & Support	\$514	\$514
0.00% Bldg Serv	\$0	\$0

Total Fixed Cost:

\$514	\$514
-------	-------

Total Operating Cost:

\$11,385	\$12,256
----------	----------

Contribution Dollars:

\$7,513	\$6,641
---------	---------

Service Bureau Profit Margin:

39.76%	35.14%
--------	--------

Break Even Charge per Image

\$0.0584

(Includes all aspects of project)

Other Margins:

index hrs	img hrs	prep hrs	total hrs	
31.11	168.00	350.00	549.11	
index empl	img empl	prep empl	pay rate/hr	Employee Capacity
0.18	0.97	2.02	15.00	94.63%
Total optimal # of emplys=	3.17	Total empls dedicated-(all shifts)=	3	
Scanner utilization based on requested project completion timeframe				102.98%
Est. Mo. Shift Cap/scanner all Ltr =	210000			
Est. Adj. Mo. Shift Cap / doc size =	210000	Tot emplys req./shft	3.17	
Cap. Adjustment % per doc size =	0.00%			

**Will increase at this amount each month assuming sustained throughput.

# Scanners dedicated for Deprec =	1	# of scanners req.=	1.00
Total Monthly Capture Capacity =	210000	(adjusted for ADF %)	
Number of anticipated Shifts =	1.0		

(Management allocated to imaging processing)
(Rent for space allocated to imaging processing)
(Utilities allocated to imaging processing)
(IT hardware and software resources for imaging)
(Deprec and Support expense of equip dedicated to imaging)
(Bldg services allocated to imaging processing)

SG&A overhead allocation (Mgt, Supv., Mkting, Etc.)	\$0
Percentage of SG&A allocated to this specific project.	0.00%

Support/Maint./Depreciation-(Annual)

Scanner/s	\$1,650	Scanner (direct w/ Manf.)
Software	\$1,403	PVE and PaperFlow Pro
Deprec / Yr	\$3,121	Scanner Equip. and Workstation (5yr)
Total	\$6,173	Assumes 60 Month

B/E	17.69%	F/E	34.13%	Enter.	27.34%
-----	--------	-----	--------	--------	--------

Management Flash Report:

Service Bureau Solution:

5/1/2010

The Perfect Client

Document Title



Total images proposed for project: 210,000

Per image rate: (inclusive) \$0.088

Per image break even rate: (inclusive) \$0.058

Project frequency: project

Internal est. project completion: (month/s) 1.09

Proposed est. project completion: (month/s) 1.36

Total initial project revenue: \$18,898

Total initial project contribution: \$6,641

Estimated initial project contribution %: 35.14%

Estimated project recurring revenue generated \$223

Estimated project recurring contribution: \$84

Estimated project recurring contribution %: 37.76%

Estimated initial iChamber™ GIG transferred: 8.20

Estimated ongoing GIG added / project 0.00

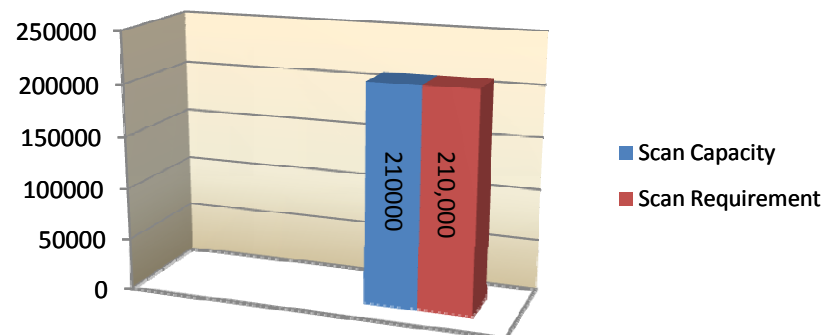
Project Comments:

This is where you can enter up to 425 characters of free form comments.

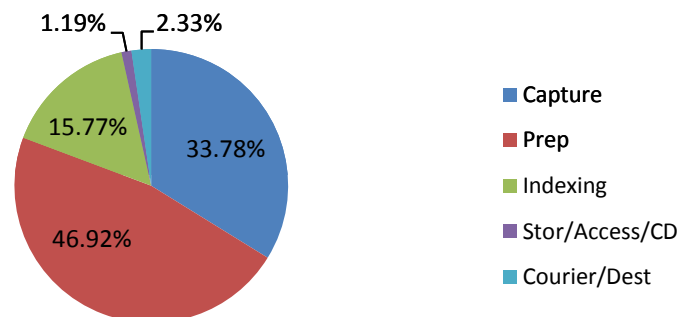
If you have no comments please delete these fields.

If you do not delete them then the client will see them.

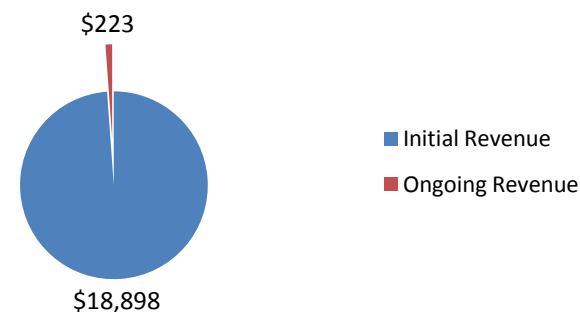
Capacity vs. Demand Analysis:



Revenue Distribution Analysis:



Initial vs. Ongoing Revenue Potential



Pricing Sheet

Date of Client Presentation- 5/1/2009

All cells protected except yellow highlighted cells - call DataChambers if you need to edit a protected cell.

Document Capture:		iChamber / Storage:		** (Discount applies)	At a Glance
Retail Per Image Scan Rate	\$0.0500	(scan,iCham only)	Retail rate for iChamber / gig / month	\$20.00	Serv Total \$\$\$
Discount offered (%)	0.00%		Retail rate for iChamber / meg / month	\$0.0195	
Discounted/Image Scan Rate	\$0.0500		DCRM Charge per gig / month	\$8.25	
Average scanner throughput per shift - letter	10000		gig transferred to iChamber per month	8.20	Serv \$0.1081
Average cost per image captured	0.020		Images per meg	25	
Adjusted throughput for doc size & ADF %	10000		Meg transferred to iChamber per month	8400	
Scanner throughput adjusted for ADF %	10000		**iChamber Charge / meg	\$0.0195	Months
Document Prep:			Charge from DCRM / meg / mo	\$0.0081	1.00
Prep docs Labor Rate	\$25.00		**Est. Stor added to iChamber / month	\$164.06	Break Even
Prep docs per hour average	600		**Est. Monthly Stor charge per img	\$0.0008	\$0.0645
Prep Reassembly Multiplier	1.5		iChamber Access Chg/Mo/User	\$25.00	Cont. \$\$\$
Reassembly Factor	1.00		Minimum Monthly iChamber Storage Charge	\$25.00	\$9,155
Small Doc / Heavy Lead Sheet Insert Factor	1.00		User to Licensee Ratio Used	33%	Cont. %%
Document Indexing:					40.34%
Indexing Alpha	\$0.250		CD / DVD and/or File Transfer:		Front
Indexing Numeric	\$0.170		CD/DVD Set/File Transfer charge per	\$35.00	\$0.1134
Auto Index/Full Text OCR	\$0.0300		Number of imgs per CD/DVD/File Transfer	8,000	
Average indexes per index employee per shift	900		# of CD/DVD's/File Trans. needed	0.00	Back
Average cost per index	0.222		Image Transfer to Client per Transfer	\$35.00	\$0.0958
			Image Transfer Frequency(# of Imgs)	8,000	
			Number of CD sets or file transfers	0	Enter
			CD/DVD Copy Mthly Vlt Storage Chg	\$15.00	\$0.0939
			CD/DVD Cap of container in vault	25	
			Number of Vault Stg Cont's Required	0	
			Rounded number of Vlt Cont's req'd	0	
Labor Miscellaneous:			Additional Services Provided:		
Average Base Labor Rate	\$15.00		Courier charge per trip	\$15.00	
Labor rate loaded	\$19.20		Destruction charge per cube or box	\$5.00	
Benefit Load Rate	28%				
Admin Labor Charge	\$30.00				
IT Consulting Fee	\$45.00				
Avg loaded hourly rate-prospect's employees	\$25.00		Initial Set-Up Charges:		
Avg daily cost per prospect's imaging employee	200		Service Bureau Clients	\$250.00	
Client IT internal support staff hourly cost	\$30.00		CD/DVD Burn / File Trans	\$125.00	
Number of hours per month of internal support	12				
Project Miscellaneous:					Est Project Lgth
Quantity reflects requirement to complete in	1.00	month/s	Proj Completion Multiplier =	1.25	Days
Quantity reflects requirements to complete in	1	shift/s	Avg # of pgs per box/cube	2500	30.22

Software and Hardware Sales Price			Exact	Rounded	Our Cost	Our Cost	Support	
	Mark-up %	Invoice \$	Qty	Qty	Total	Each	Our Cost ea	Invoice Each
Scanner-(fi-6770)	10%	\$7,370	1.00	1	\$6,700	\$6,700		
Workstation/Card/Cable	10%	\$1,433	1.00	1	\$1,303	\$1,303		
PaperFlow Pro	10%	\$6,820	1.00	1	\$6,200	\$6,200	\$1,118	\$1,230
Papervision Enterprise	10%	\$935	0.99	1	\$850	\$850	\$157	\$173
Papervision Dist Asst	10%	\$605	1.00	1	\$550	\$550	\$110	\$121
Install/Config/Training / Hr	15%	\$115	1.00	1	\$100	\$100	Training / Hour	Config Rate
Scanner Maint from mfg	0%	\$1,650	1.00	1	\$1,650	\$1,650	\$100.00	\$600.00
		\$18,928					Travel Expenses Not Incl.	
Total system cost (less scanner maint) for depreciation					\$15,703	\$15,703	\$1,275	\$1,403

Total Hardware -----

Total Software -----

Total Annual Support -----

\$8,003

\$7,600

\$1,403

Document Title

iChamber Solution

ABC Records Management

**ABC Records Management
Projected Business Analysis**

Document Title

iChamber Solution

**Prepared for:
The Perfect Client**

All cells protected except yellow highlighted cells - call DataChambers if you need to edit a protected cell.

Date of Client Presentation- 5/1/2009

Following assumes project completion of aprox. **210,000** completed in **1.00** months. Adjusted to **1.15** months for employee capacity.

Following assumes dedicating **1.0** scanner/s for **1** shift/s = monthly cap. of **210000** total images per month.

Requested months for completion of this project = **1**

Revenue:

38.56% Prep / Reassembly	\$8,750			Rate/	per				
12.95% Indexing	\$2,940	# of imgs/indx	30	\$0.0417	img	(Will bill at	\$25.00	per hour)	
0.72% Storage - one month	\$164			\$0.4200	indx	(Billed per index - alpha-	\$0.25	numeric-	\$0.17)
46.27% Imaging	\$10,500			\$0.0008	img			(Auto ndx/Full OCR-	\$0.03)
1.10% Set-up/Sys Admin	\$250	# of hrs =	0	\$0.0500	img				
0.07% Courier/Destruction	\$15	Courier \$\$\$	\$15.00	\$45.00	hr				
0.33% iCham/Burn/File Trans	\$75	total CD's/Trans	0.00	-----Dest \$\$\$	\$0.00				
Total Project Revenue:	\$22,694	(set-up not incl)	\$0.108	\$35.00	per set of 2 CD's or per file transfer				
Total Monthly Revenue:	\$22,694				= avg cost per image				

Variable Cost:

	Monthly Exp	Total Proj Exp
66.82% Wages	\$7,560	\$8,703
18.71% Loading	\$2,117	\$2,437
0.00% Misc Expense	\$0	\$0
0.00% Comp Supply	\$0	\$0
13.94% Sales Commission	\$1,816	\$1,816
0.00% Office Supplies	\$0	\$0
0.53% iChamber Storage **	\$60	\$69

Total Variable Cost:

\$11,553	\$13,025
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Fixed Cost:

0.00% Overhead Allocation	\$0	\$0
0.00% Rent	\$0	\$0
0.00% Utilities	\$0	\$0
0.00% Support and Maint.	\$0	\$0
100.00% Deprec & Support	\$514	\$514
0.00% Bldg Serv	\$0	\$0

Total Fixed Cost:

\$514	\$514
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Total Operating Cost:

\$12,067	\$13,540
----------	----------

Contribution Dollars:

\$10,627	\$9,155
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Service Bureau Profit Margin:

46.83%	40.34%
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Break Even Charge per Image

\$0.0645

(Includes all aspects of project)

Other Margins: B/E 17.69% F/E 38.98% Enter. 27.34%

index hrs	img hrs	prep hrs	total hrs		
62.22	168.00	350.00	580.22		
index empl	img empl	prep empl	pay rate/hr	Employee Capacity	
0.36	1.00	2.02	15.00	88.79%	
Total optimal # of emplys=	3.38	Total empls dedicated-(all shifts)=		3	
Scanner utilization based on requested project completion timeframe				100.00%	
Est. Mo. Shift Cap/scanner all Ltr =		210000			
Est. Adj. Mo. Shift Cap / doc size =		210000		Tot emplys req./shift	3.38
Cap. Adjustment % per doc size =		0.00%			
**Will increase at this amount each month assuming sustained throughput.					
# Scanners dedicated for Deprec =	1	# of scanners req.=	1.00		
Total Monthly Capture Capacity =	210000	(adjusted for ADF %)			
Number of anticipated Shifts =	1.0				
(Management allocated to imaging processing)					
(Rent for space allocated to imaging processing)					
(Utilities allocated to imaging processing)					
(IT hardware and software resources for imaging)					
(Deprec and Support expense of equip dedicated to imaging)					
(Bldg services allocated to imaging processing)					
SG&A overhead allocation (Mgt, Supv., Mkting, Etc.)		\$0			
Percentage of SG&A allocated to this specific project.		0.00%			
Support/Maint./Depreciation-(Annual)					
Scanner/s	\$1,650	Scanner (direct w/ Manf.)			
Software	\$1,403	PVE and PaperFlow Pro			
Deprec / Yr	\$3,121	Scanner Equip. and Workstation (5yr)			
Total	\$6,173	Assumes 60 Month			

Management Flash Report:

Service Bureau Solution:

5/1/2009

The Perfect Client

Document Title

Total images proposed for project: 210,000

Per image rate: (inclusive) \$0.106

Per image break even rate: (inclusive) \$0.064

Project frequency: monthly

Internal est. project completion: (month/s) 1.15

Proposed est. project completion: (month/s) 1.44

Total initial project revenue: \$22,694

Total initial project contribution: \$9,155

Estimated initial project contribution %: 40.34%

Estimated monthly recurring revenue generated \$22,369

Estimated monthly recurring contribution: \$8,830

Estimated monthly recurring contribution %: 39.47%

Estimated initial iChamber GIG transferred: 8.20

Estimated ongoing GIG added / monthly 8.20

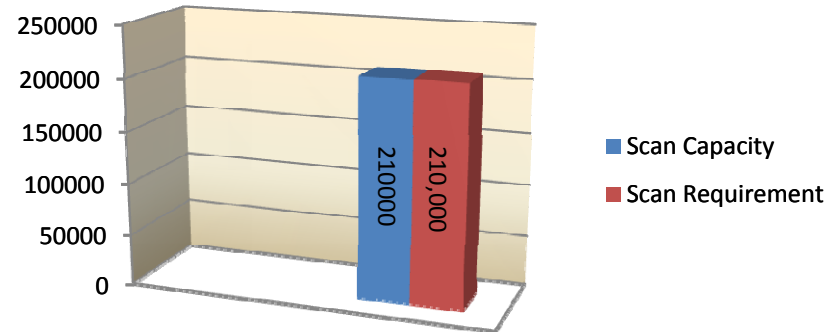
Project Comments:

This is where you can enter up to 425 characters of free form comments.

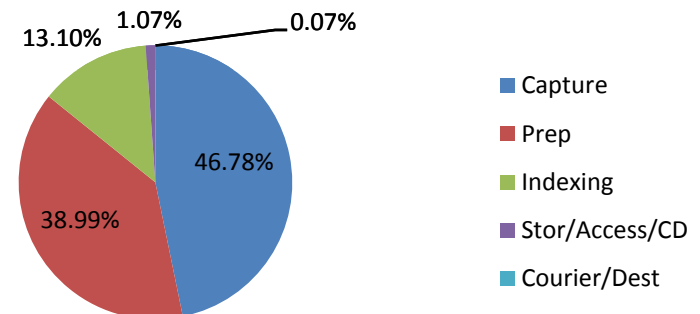
If you have no comments please delete these fields.

If you do not delete them then the client will see them.

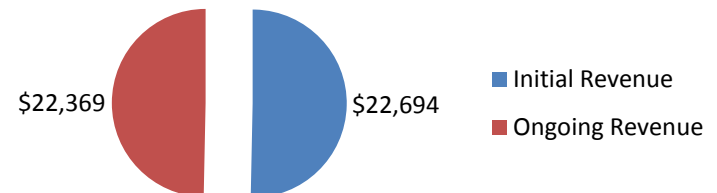
Capacity vs. Demand Analysis:



Revenue Distribution Analysis:



Initial vs. Ongoing Revenue Potential



Sample “Service Bureau Agreement”

ABC Records Management

Service Bureau Agreement

The following outlines the services and related charges for - - - - - iChamber™ Solution services to be provided
(Type of service)
for - The Perfect Client and authorized by ----- Primary Contact
(Company Name) (Company Contact)

General Information: Client P.O. # Service Agreement # N/A

(see attached proposal for addl project related specifications)

Charges:

	<u>\$/unit</u>	<u>est. qty.</u>	<u>est. tot. \$</u>
Document Prep	\$25.00 / hr	350.00	\$8,750.00
Indexing - Data Entry	\$0.42 / file	7,000	\$2,940.00
Document Scanning	\$0.0300 / img	210,000	\$6,300.00
Courier and Destruction Services	\$0.00207 / img	210,000	\$435.00
CD/DVD-Copy Vault Storage (monthly)	\$15.00 / cont	0	\$0.00
Initial Set-up Fee (one-time charge)	\$250.00 / proj	1	\$250.00
iChamber™ Access/User Mgt Fee (monthly)	\$25.00 / user	3	\$75.00
Est Elec Retention & Retrieval: (iChamber™)	\$0.0176 / mb	8,400	\$147.66
CD/DVD Burn-FTP Transfer to Client	\$35.000 / set	0	\$0.00
Total Estimated Charges			\$18,897.66

Note: These are estimated charges based on the information provided (see attached). Actual quantities will be billed.

The above service is to begin on _____ per above contacts signature below.

The above service is to completed by _____ provided scope of work is not modified.

This proposal is presented by ----- Rep #1 an authorized representative of ABC.

Project Name: Document Title

Agreed to by: _____ Date : ____/____/____
(Authorized Company Representative)

Title: _____ This project is to be billed to client # ---
(Contact Title)

5. *iChamber*[™] – Image Repository

A. General Description

Most of you have either seen or heard about the Business Continuity and Hot-Site company we operate here in Winston-Salem, NC.

This endeavor affords us the opportunity to store the images that we manage in a facility where we know they will be safe, secure, monitored and managed. Part of what we offer you, is the opportunity to enter into the Document Imaging Service Bureau arena without the addition of costly hardware.

Additionally, the storage cost we will pass on to you will allow you to make good margins on the iChamber[™] service and still be very competitive in your marketplace.

Simply stated, you will upload the images that are scanned daily to our *iChamber*[™] server network. They then become available for your clients by going through your web page and clicking on an *iChamber*[™] link. Once they have entered security information authenticating them as an authorized user, they will have access to their documents.

B. Features

DataChambers – iChamber[™] Service provides organizations with simple, complete and affordable, Internet Imaging Service Bureau solution.

Advantages Include:

- Secure, Scalable, Flexible, Reliable and Efficient Software
- Durable, Reliable, and Productive Hardware
- Images stored in our bunkered data center / disaster recovery environment
- Image transfer can utilize existing Internet connectivity

DataChambers Online Storage

DataChambers' Online Storage service offers a simple and secure method of storing data to secure and highly available disk storage. Based on the FTP-S (FTP over SSL) protocol, the service can be combined with other Business Continuity services to provide a complete information storage solution.

Features:

- Secure SSL encryption
- Minimal configuration necessary
- Automatic connection recovery
- Multiple levels of security
- Drag and Drop Transfers
- Scheduled Transfers
- Email notification of transfer status

- Available for:
Microsoft Windows 2003
Microsoft Windows 2000
Microsoft Windows NT
Microsoft Windows XP
Microsoft Windows 9x

Components:

1. Secure FTP over SSL client – Local client that utilizes the FTP over SSL protocol. It requires little configuration (server address, username, password) and is very easy to use. Once installed, the client can be used to manually upload files, drag-and-drop files, or schedule unattended file transfers. The application can also be configured limit its bandwidth usage and notify the user of successful uploads via e-mail.
2. FTP Server – Scalable cluster of servers, with Terabytes of storage space, all backed up nightly to disk and tape, in a subterranean, secure data center.
3. FTP-S – A standard Internet protocol supporting AUTH SSL & 168-bit SSLv3 encryption featuring failed transfer retries, transfer bandwidth control, transfer scheduling, protocol keep alive functionality, and FTP/HTTP proxy support.

6. Frequently Asked Questions

1. **Why do I need Electronic Document management?** Instant retrieval of documents gives you an incredible competitive advantage. EDM gives you the ability to share documents across your organization, without ever compromising the originals.
2. **Who is DataChambers Records Management?** DataChambers Records Management (formerly Twin City Records Management) is a division of Twin City Warehouses, Inc. Twin City Warehouses was founded in 1974 by the Brown family and the records management division was established in 1983. For over 20 years we have been serving customers throughout the Triad ranging from small companies to the largest corporations in the area. Our goal is to provide the absolute best service and facilities to our customers, promoting accountability to, and flexibility for them. DataChambers is an authorized licensed reseller for Digitech Systems Software.
3. **Who is Digitech Systems Inc.?** Digitech Systems, Inc. is a recognized leader in the development of software and services in the document industry. They are committed to bringing the prospect of “Any Document-Anywhere-Anytime”™ to an affordable reality. The strength of their brand lies in the values of God, family and work upon which the company was founded and is run, the quality people who work there, their products and their legendary toll-free personal customer support.

Their strategic intent is to position the company, not as a category killer, rather, as an extremely competitive boutique player delivering world-class products and services to their customers, while maintaining their focus on their core competencies, and being a stable, reliable, and long-term business partner to all of their stakeholders.
4. **Why should I purchase Digitech Software through DataChambers?** Digitechs’ business model calls for them to sell through a network of resellers. We have partnered with them as a reseller and our agreement with them demonstrates our commitment to this relationship.

FAQ's (Con't)

5. **Why did DataChambers partner with Digitech?** They Own The Entire Process. With Digitech you never have to try to figure out where to call for technical support. So, if you have a question about capture, document management/retrieval, workflow or application services, they stand ready to support your entire document management need. All it takes is one call.....and they'll answer! Digitech competes on several fronts. Whether it is capture, retrieval/document management, workflow or ASP, they stand tall in every category thanks to, 1. ease-of-use, 2. price/performance, 3. architectural flexibility and 4. feature functionality. This truly sets them apart from the competition.
6. **What product mix do I need to get started?** Digitech offers a complete suite of software tools to meet all of your Electronic Document Management needs. DataChambers Records Management will work with each client independently to identify which mix of Digitech products to purchase.
7. **What are the hardware/software requirements?** The system component requirement for each available Digitech product is located on the back page of the product offering technical sheets.
8. **Who will provide technical support for Digitech Systems Software sold?** DataChambers will be the first line of support for all companies choosing to sign on with us. Should there be support issues that we are unable to resolve we have the power of Digitech and their "legendary" support behind us. Digitech takes great pride in providing software that is extremely simple to use, feature-rich and provides great flexibility both in architecture and in integration capabilities.
9. **What agreements and licensing are required?** End user license agreements will be required for the use of DIGITECH software products, which include computer software and associated media and printed materials, and may include "online" or electronic documentation ("SOFTWARE PRODUCT" or SOFTWARE"). Additionally you will be asked to sign a simple "Service Agreement" with DataChambers outlining expectations and responsibilities of both parties.

FAQ's (Con't)

10. **What brand of scanner should I purchase?** We have established relationships with both Fujitsu and Cannon. We can assist you in the ordering process and can also do the initial set-up and configuration of the scanner. In addition PaperFlow supports more than 300 ISIS compatible scanners on the market. These scanners are supported using Adaptec SCSI cards (2940 or higher recommended for high speed scanners). Paperflow also supports the use of Kofax KF-series cards (using Kipp 2.12) and Kofax Adrenaline cards (using Image Controls) with certain scanners. Ultimately, the scanner you purchase should reflect your anticipated throughput, paper sizes, color mode and whether you plan to scan in simplex or duplex modes.
11. **Who will provide technical maintenance and support for my scanners?** All technical and maintenance support will be provided by the original equipment manufacturers and/or their certified third party service providers.
12. **Where can my images be stored?** While we strongly suggest that you take advantage of our *iChamber™* service for remote/on-line access, you may choose to store them on a CD, Virtual Jukebox, Iomega Jaz, Optical Drives, and Hard Drives. Also keep in mind you may choose to start with our *iChamber™* service and at some future point transfer all images from *iChamber™* to your storage device.
13. **How will I be billed for *iChamber™* storage?** *iChamber™* storage charges will be billed monthly as an item on your invoice based upon the total amount of disk space usage. Please refer to the price list for all related pricing and products.
14. **Who will provide software, hardware, and process training?** All Digitech software products purchased through DataChambers Records Management will include product training.

7. Conclusion

A. Document imaging is our friend – As mentioned earlier, it is not a matter of “if” document imaging will be presented to your existing client base, but a matter of “when”.

If you embrace the opportunity to increase your value to your clients and approach this service offering with the same level of effort you invest in boxes, I truly believe you will be amazed at the impact it will have on the way your clients perceive your company’s role in assisting them with their information management needs.

Document imaging is typically operated in a sweat shop environment and sold by slick sales people preying on every piece of paper that exists and cramming it in a scanner.

You have an opportunity to solidify your relationship with existing clients and build new relationships in your market by offering this service as part of a solution selling module. Now you will be able to address most any information management opportunity that presents itself.

B. Document Imaging can contribute high margins – We are seeing overall margins of 35% – 55%. Obviously we all allocate our overhead differently and calculate contribution margins in our own special way, but any way you look at it the potential here is excellent.

One of the many advantages we have over a stand alone imaging service bureau is the fact that we can reallocate our labor resources as the demand fluctuates in the various pieces of the business. We are constantly shifting manpower between indexing, open shelf filing and imaging.

Another factor to consider is that you can potentially reach \$500,000 in revenue before you need to add an additional scanner simply by operating two (2) shifts.

Granted, scheduling will become an issue and imaging clients will become impatient, but you get my drift. Opportunities abound.

C. Document Imaging is happening with or without you – Well the choice is yours. Make it happen or watch it happen. We have never regretted our decision to enter the market and it has actually added some excitement to our little box world.

We look forward to an opportunity to introduce you to this exciting and profitable opportunity.